Consult Accelerator 4.5:

Intended for the End User

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Introduction

This user manual will provide you with basic information on how to use the Consult Accelerator application. It discusses the intended workflow, how to log in to the application, enter data, make changes to data, and search for completed cases. Questions about specific issues not covered in this manual can be directed to Emerge MD at support@emergemd.com.

Consult Accelerator – Application Workflow

The following is an outline of the workflow for the Consult Accelerator application:

Referrer – Account Creation

1. Open your internet browser and go to the Consult Accelerator website provided by your administrator.
2. Log into the application.
3. Click on the **Create Patient** button at the top of the dashboard.
4. Fill in the patient's Quick Registration demographic information and click **Save & Exit**. Required questions are marked by an asterisk and highlighted in yellow.
5. If desired, you may click on the **Continue to Patient Contact Information** button to fill in contact information for the patient. When this page is completed click on the **Save Demographics** button to save the information.
6. When demographics are complete you will be taken to the Patient View. From here you can create a new case or edit the demographic information.

Referrer – Add a Case

7. To add a new case click on the **Add Case** button.
8. Select the Service Line you want to refer to and then click on the **Save and Continue** button.
9. Answer the questions specific to the service line you chose, including uploading any attachments, and then click the **Save and Continue** button, this will submit your case.
10. From the case summary page you can click on the **Edit Case** button if you need to go back and make any changes.
11. From the summary page you can also assign the case to yourself or someone else using the **Assign** and **Assign to Me** buttons.
12. If you start the referral case but don't finish it, the patient will show up in the **Cases Started** queue so you can return easily to the case.
13. Once you submit the case the patient will show up in the **Cases Waiting** queue and a notification will be sent to the appropriate specialist that a case has been submitted. However, if you assigned the case to someone it will appear in the **Assigned Cases** queue instead.

Specialist – Provider Notes

14. When a case has been submitted to you the case will appear in the **Cases Waiting** queue. Click on the case you wish to review and then click the **Add Provider Notes** button to review and comment on the case.

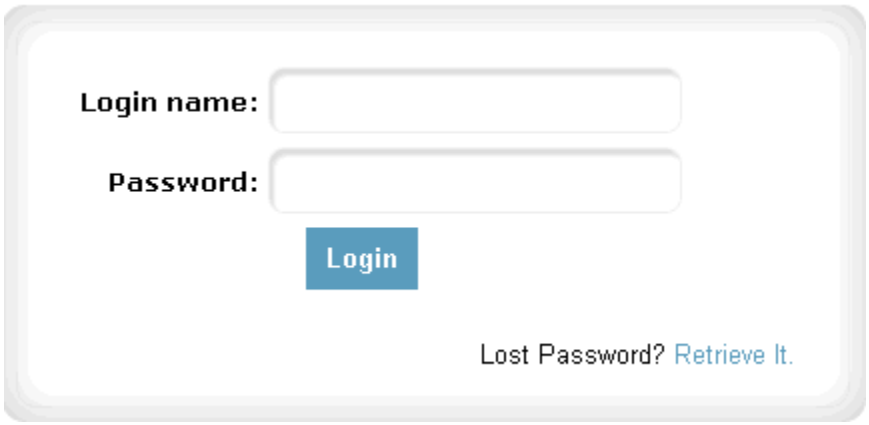
15. A summary of the case appears at the top of the page for you to review. If you need to consult with the referring doctor you can do so from this page using the **Collaboration** button provided. The collaboration can be audio only or audio/video. When you are done on this page click on the **Continue to the Review and Signature Page** button to continue.
16. If you change your mind about filling out the provider notes at this time, you can click on the **Return to summary** button. This will discard any information you have filled out on this page.
17. The Review and Signature page contains all of the case information including the notes you made on the case. If you need to alter your notes or recommendation you can click on the **Update Provider Documentation** link to go back and make edits.
18. Once you have checked the box to sign click on the **Sign and Complete** button to submit.
19. After submitting, a final summary of the case will appear that you can download as a CCD or PDF using the **Download CCD** or **PDF** buttons.
20. If you begin the provider notes but do not finish, the case will appear in the **Assigned Cases** queue.
21. When you sign off on the provider notes the case will then appear in the **Cases Completed** queue.

Specialist/Referrer – Followup Notes

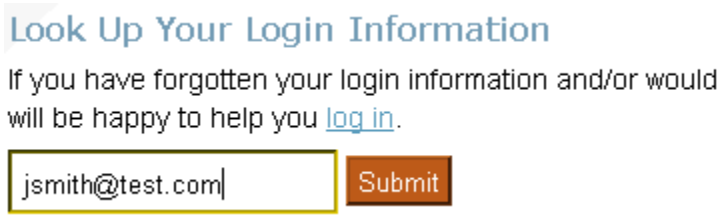
22. Once a provider has signed a case and it is closed you can still add notes to the case using the followup notes form. Click on the **Add Followup Notes** button to append notes to a case.
23. Add your notes, check the box to sign, and then click on the **Complete** button at the bottom of the page to save the information.

Log In

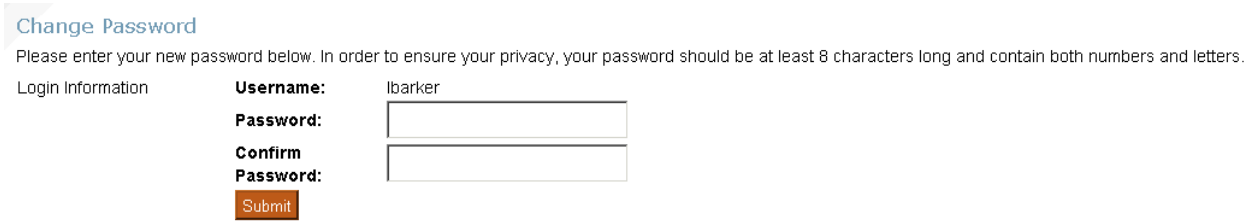
Open the application and log in by entering your ***Username*** and ***Password*** and clicking on the **Login** button.



If you have forgotten your login info click on the **Retrieve It** link. This will take you to the **Look Up Your Login Information** page where you can enter your email address to be sent information on accessing your account.

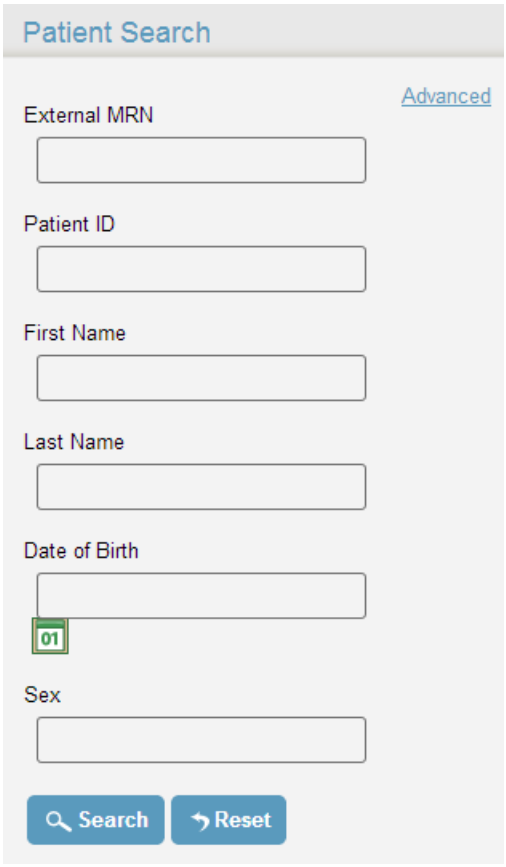

Look Up Your Login Information
If you have forgotten your login information and/or would
will be happy to help you log in.
jsmith@test.com
Submit

Clicking on the link in the email sent to you will take you to the **Change Password** page. From here enter and confirm your new password and click **Submit**. You will be taken into your account and will use this new password to log into your account going forward.


Change Password
Please enter your new password below. In order to ensure your privacy, your password should be at least 8 characters long and contain both numbers and letters.
Login Information
Username:
lbarker
Password:
Confirm Password:
Submit

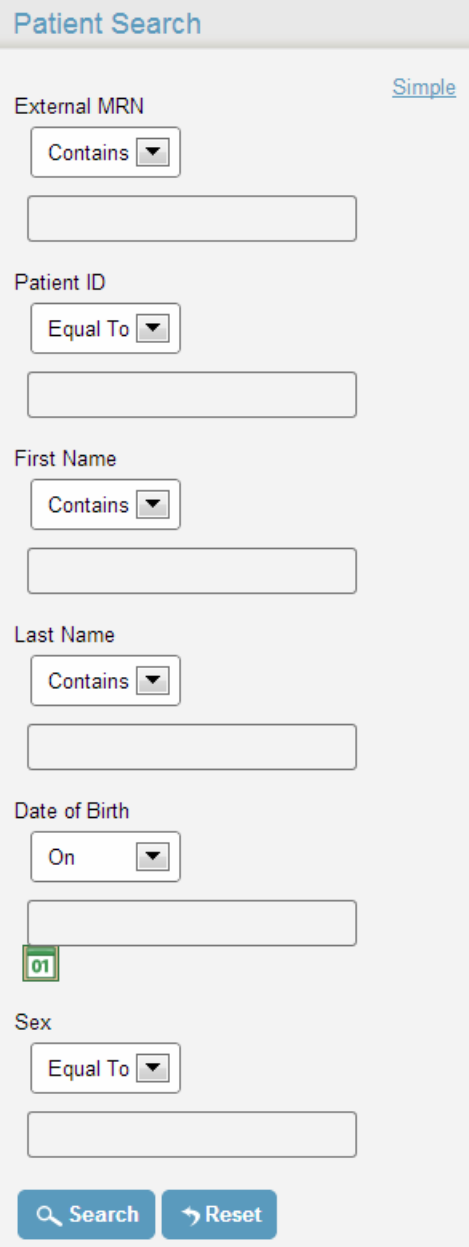
Search for an Account

You can search for an account by entering the patient's ***Medical Record Number***, ***ID***, ***First Name, Last Name***, ***Date of Birth,*** or ***Sex*** into the textboxes in the **Patient Search** section of the Dashboard page. You may also just select the **Search** button without entering any information to return all patients.



Advanced Search

Clicking on the **Advanced** button in the **Patient Search** section of the Dashboard page will display drop down menus containing filter settings for each search field. You can change these settings to broaden or refine a search field.



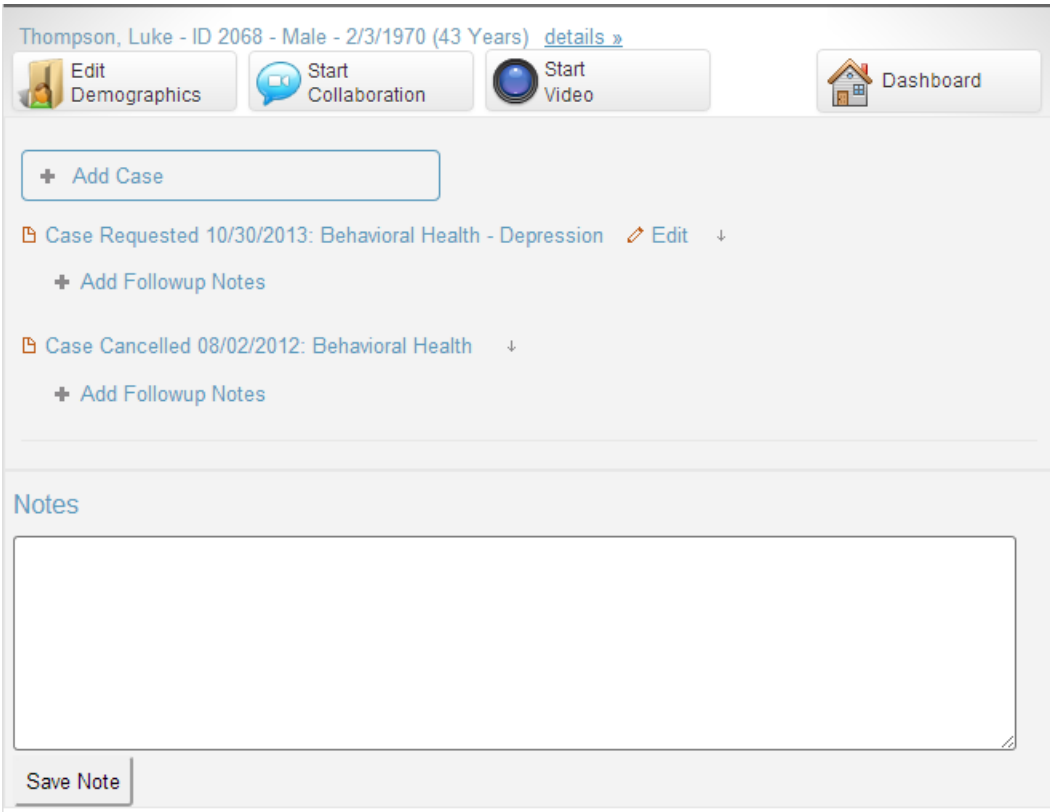
You can refine your search by using the drop down menus to change the search filters. If you select the filter "Contains" for the Last Name field and then enter "ier" into the corresponding field box, all last names containing "ier" will be displayed on the search results page. To return to the simple search click the **Simple** button. To clear all information entered into the textboxes click on the **Reset** button.

Search Results

If you have entered enough information for the database to identify the patient account then you will be taken directly to the Patient View for that patient. If the database holds patients who have similar values for the same fields then the application will navigate to a **Search Results** page to display the patient accounts that match the search.

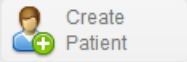
Below is an example of the **Search Results** page. In the ***Details*** column, on the far left next to each account, you will see an edit button. By clicking the edit button, the application will take you to the Patient View for that patient. You can do an advanced search by clicking on the **Refine Search** button and to return to the Dashboard page click on the **Back to Home** button.

Below is one example of a Patient View.

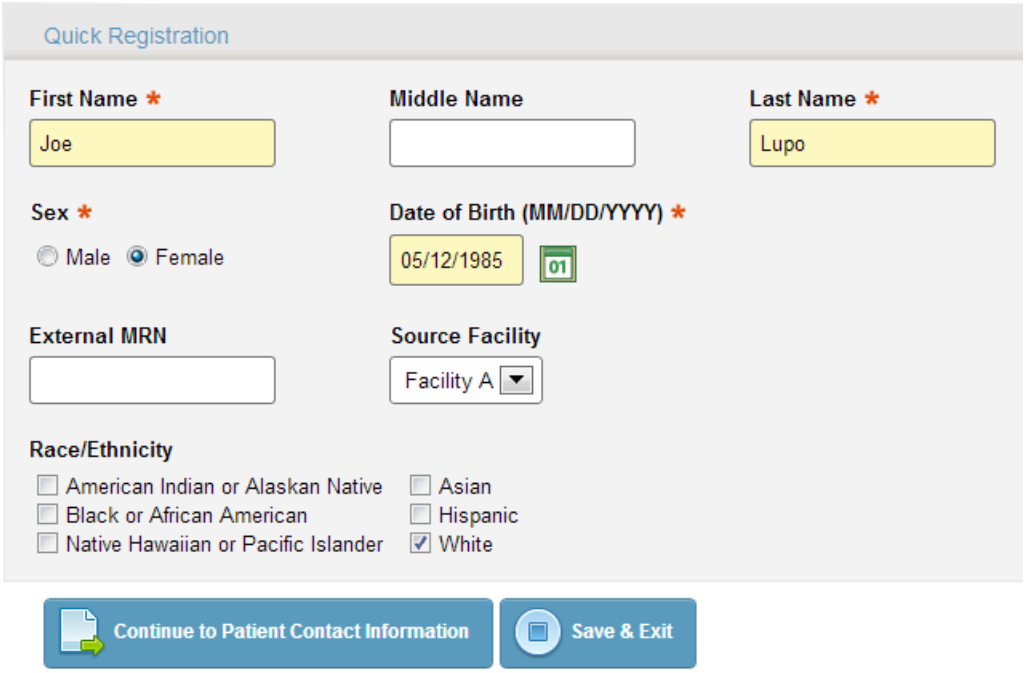


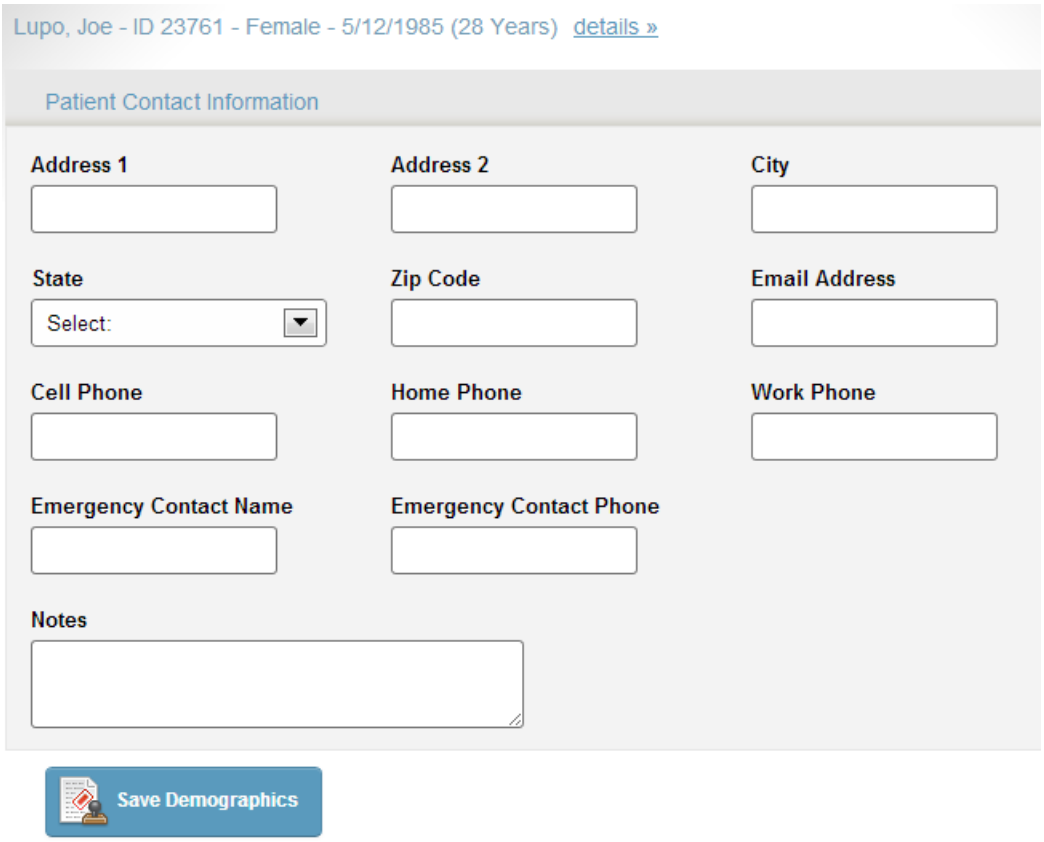
Referrer – Account Creation

From the Dashboard, click on the **Create Patient** button at the top of the page.



You will be taken to the Quick Registration section of the Demographics form. Here you will fill in a series of fields that identify the patient. When you are finished entering data you can either click the **Continue to Patient Contact Information** button at the bottom of the first page to continue to the Contact Information section or you can click **Save & Exit** to exit the Demographics form. When you are done filling in the second page, click the **Save Demographics** button at the bottom of the page to save the data. All questions marked with an asterisk are required and must be answered in order to complete the form.

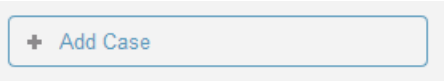


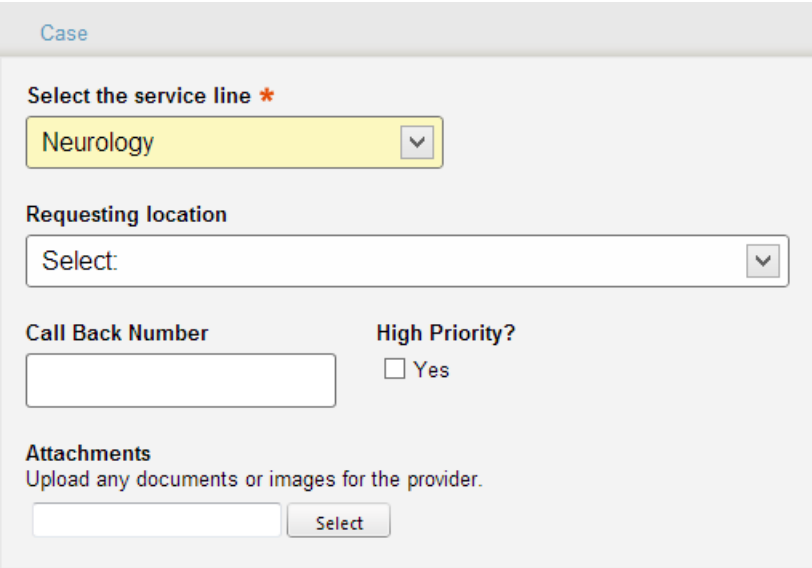


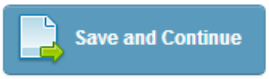
When demographics are complete you will be taken to the Patient View. From here you can create a new case or edit the demographic information.

Referrer – Add a New Case

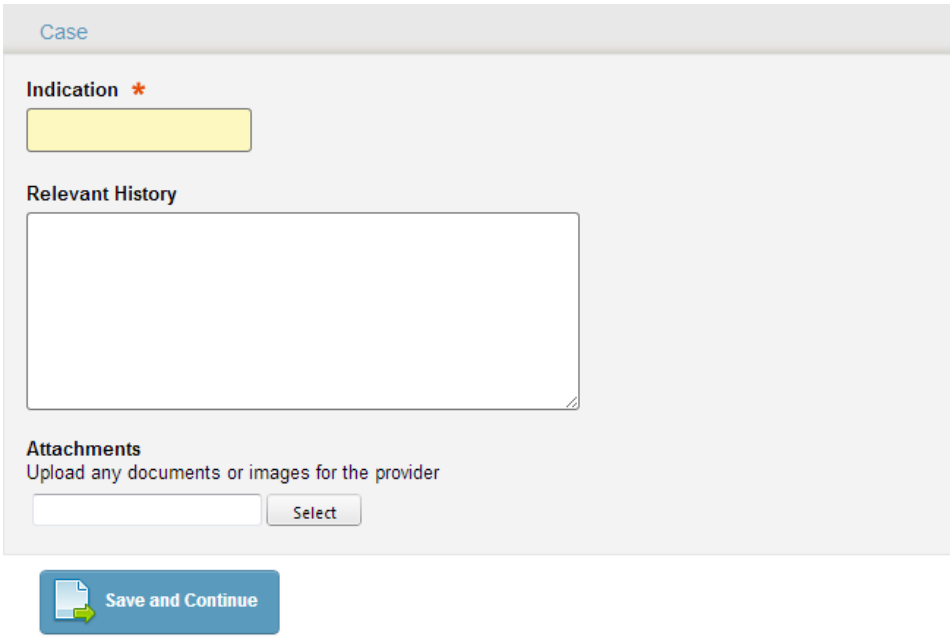
To add a new case click on the **Add Case** button. Select the Service Line you want to refer to and, if it applies, the Requesting Location. If the call back number for the requesting location has been set up by an administrator it will fill in automatically when the location is selected. You can always manually add or edit the Call Back Number. Finally, if this is a high priority case, check the High Priority box. Checking high priority for a case will mark it with a star and cause it to stay at the top of the queues. When you are done filling out the information click on the **Save and Continue** button.





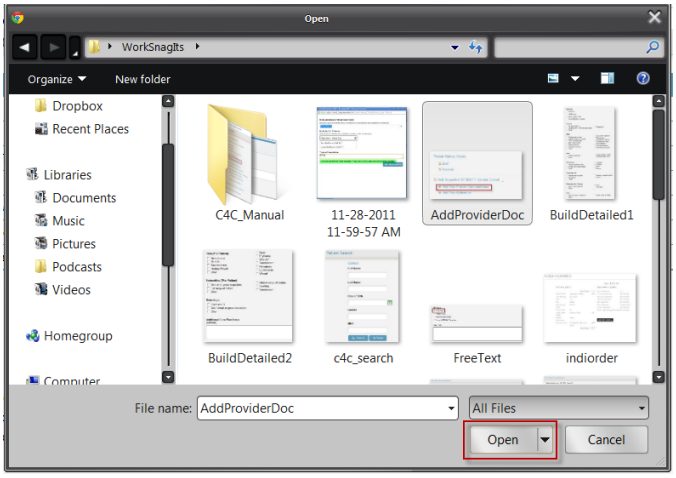


The following page will contain questions specific to the service line you have chosen. Below is an example of a Quick Consult form.

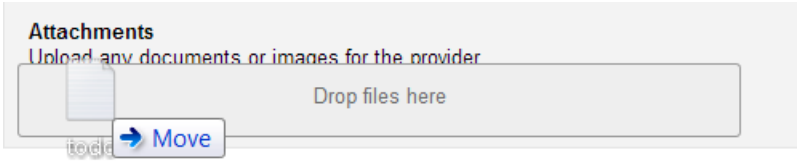


You can also upload relevant documents to this page using the file upload function. Click on the **Select** button under attachments to browse to and attach files.

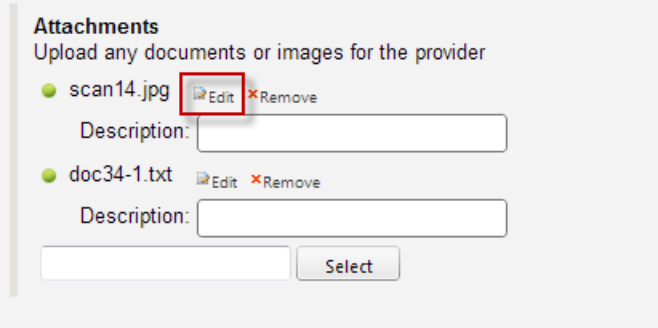
Select the file you wish to attach and click **Open** to attach it. The attached file shows up under Attachments.

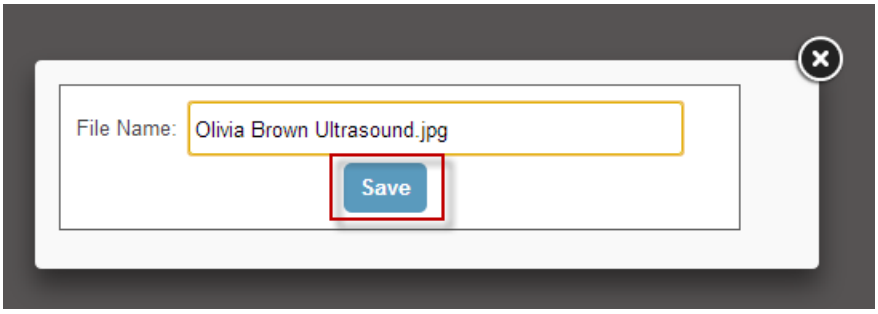


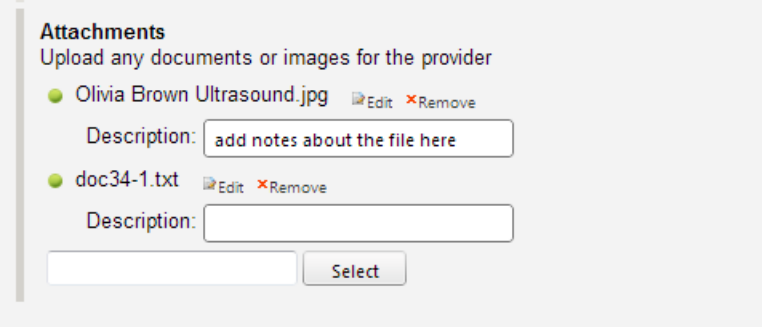
If you are using Firefox, Chrome, or IE 10 or better you can also drag and drop files to attach them. Simply drag the file you want to attach to the area under the Attachments header. You will see a box appear that says Drop files here. Drop your file and it will show up under Attachments.



You can click the Remove button if you decide you do not wish to attach this file. You can click the Edit button to give the file a better name and you can also add a description of the file in the Description box. To edit the file click on the Edit button, change the name, and then click Save.

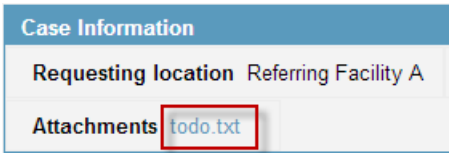






After completing the form if you wish to download, view, or delete any attachments you would click on the **Edit** button next to the Case link.

You can view the attachment from the case summary page by clicking on the link.



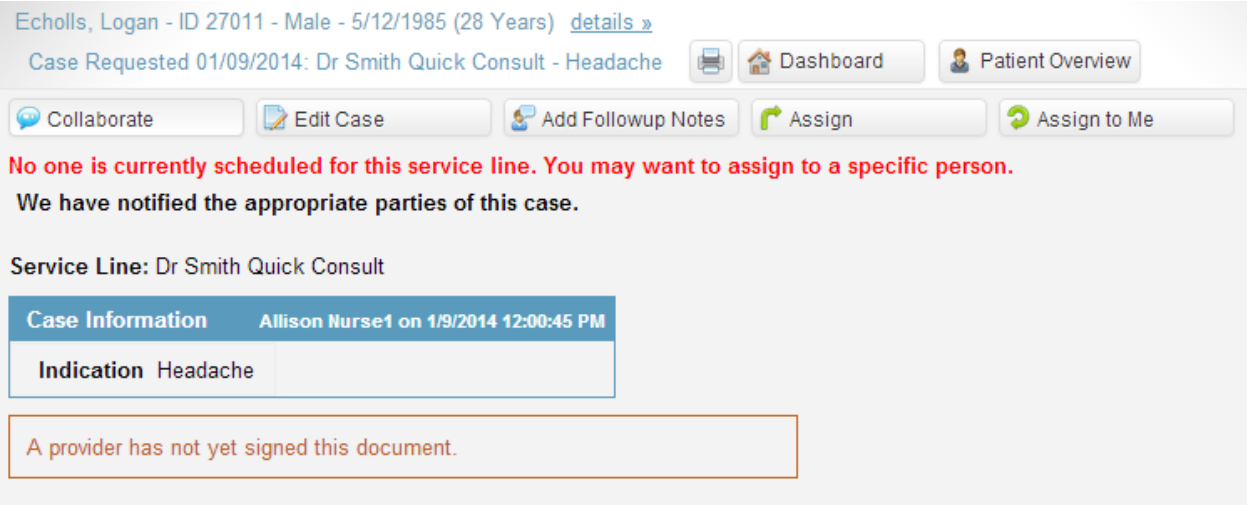
If you want to edit or delete the attachment click on the **Edit Case** button. You may have to click the **Save and Continue** button until you get to the page containing the attachment. From there click on the edit button next to the attachment to edit the file name or description or the trash can to delete the attachment. Note that once a case is signed by a provider it is locked and will not allow you to delete or edit attachments.

When you are done working with attachments and filling in the form click the **Save and Continue** button to save any changes.

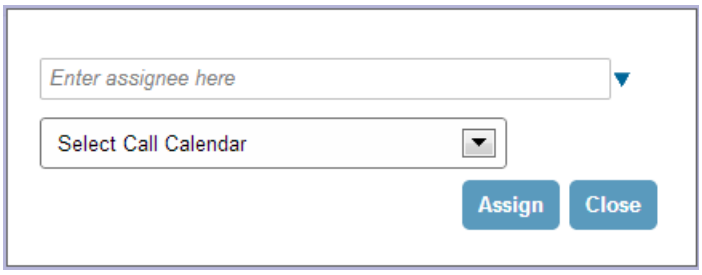
You will be taken to the case summary page. From here you can click the **Edit Case** button if you need to go back and make any changes. You can also add notes to the case using the **Add Followup Notes** button.

Assign a Case

From the case summary page you can assign a case to yourself or someone else using the **Assign to Me** or the **Assign** buttons.

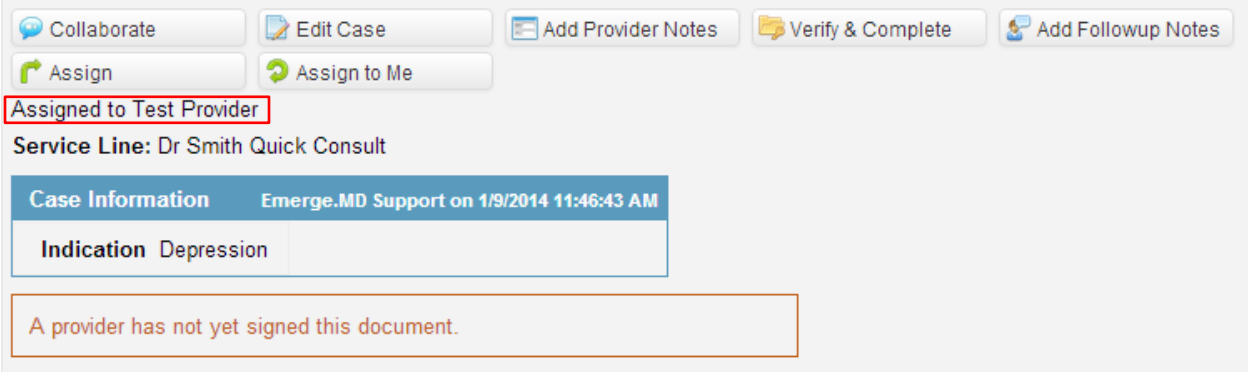

Echolls, Logan - ID 27011 - Male - 5/12/1985 (28 Years) details »
Case Requested 01/09/2014: Dr Smith Quick Consult - Headache
Dashboard
Patient Overview
Collaborate
Edit Case
Add Followup Notes
Assign
Assign to Me
No one is currently scheduled for this service line. You may want to assign to a specific person.
We have notified the appropriate parties of this case.
Service Line: Dr Smith Quick Consult
Case Information
Allison Nurse1 on 1/9/2014 12:00:45 PM
Indication Headache
A provider has not yet signed this document.

Clicking the **Assign** button will bring up the Assign window. Choose someone from the User list or by Call Calendar and then click on **Assign**.



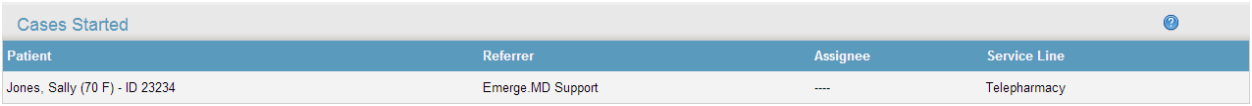
To assign a case to yourself click on the **Assign to Me** button.

Once you have assigned the case to someone the information will show up on the case summary page.



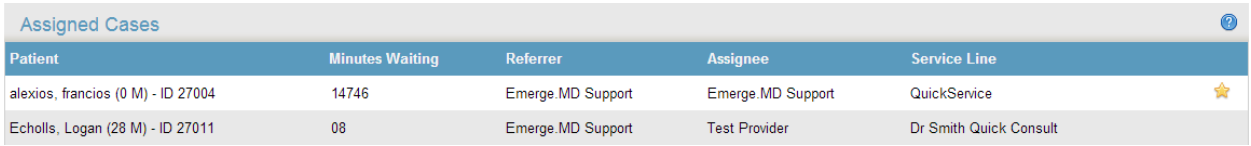
The name of the assignee will also show up in the queues.

If you start the case but don't finish it, the patient will show up in the **Cases Started** queue so you can return easily to the case.



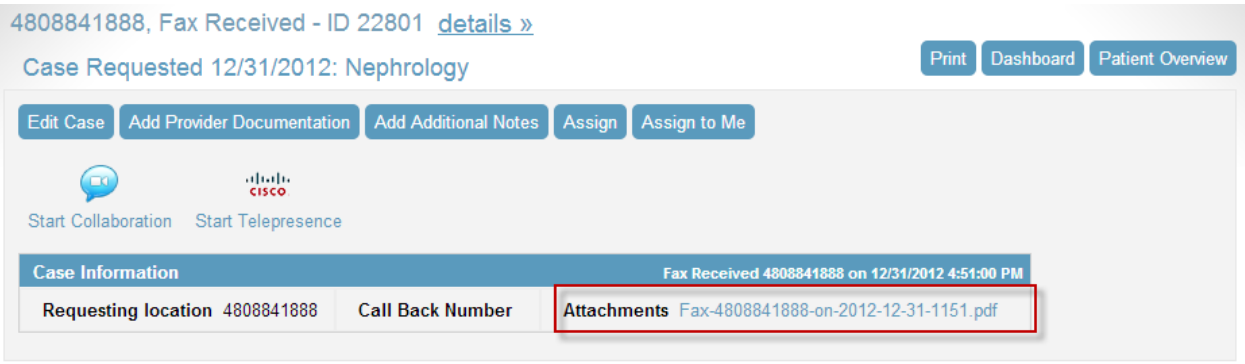
Once you submit the case the patient will show up in the **Cases Waiting** queue and a notification will be sent to the appropriate specialist that a case has been submitted.

If you assigned the case to someone the case will show up in the **Assigned Cases** queue.



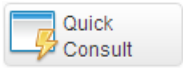
Submitting a Case by Fax

Each specialty service line can now optionally provide their referrers with a dedicated fax number used to submit cases. Faxes sent to this number will become cases in Consult. The application will attach the faxed documents as a PDF to the case. The provider on call for the service line will receive a notification that a new case has been submitted. The case can be reviewed, added to, and assigned like any other case.

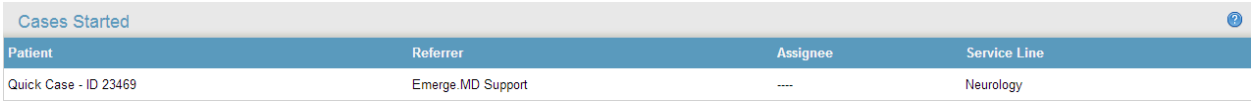


Submitting a Quick Consult Case

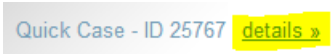
If you don't have the time to create a patient account before starting a case you can start a Quick Consult Case. Click on the **Quick Consult** button at the top of the dashboard page to start the case.



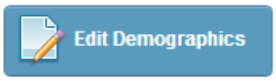
You will be taken to the select a service line page just like when you add a case to a patient's account. The case will be submitted with no patient details. It will have only a unique ID number. It will appear in the queues as Quick Case followed by the ID number of the case.

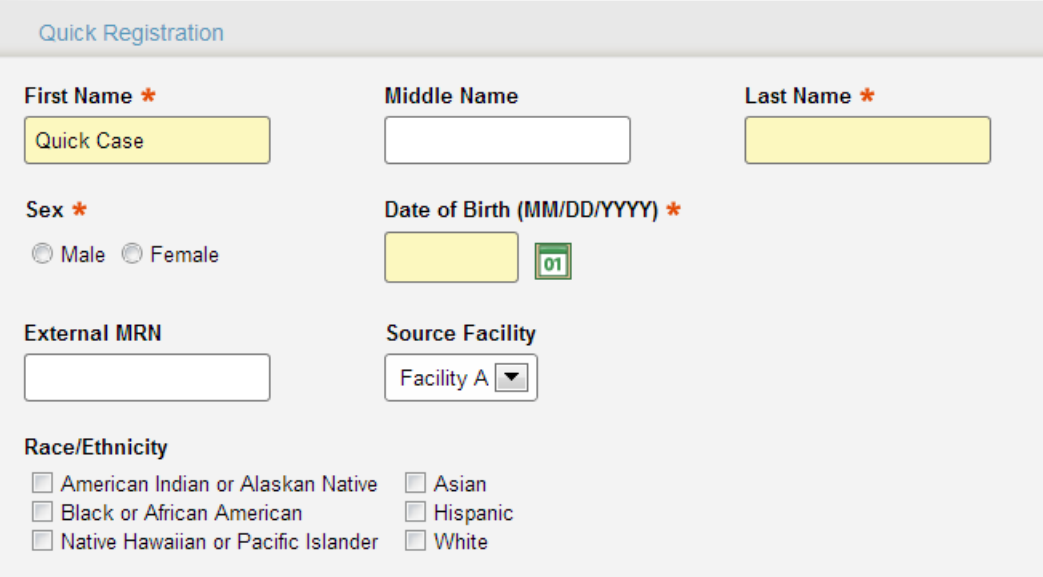


You can add patient information to the Quick Case later by clicking on the **details** link at the top of the case summary.

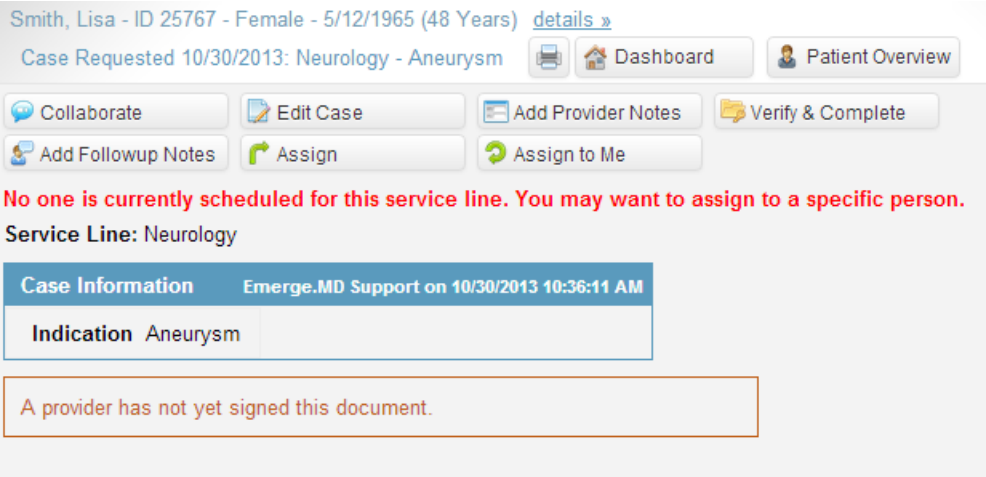


Clicking details will take you to the demographics summary page. Click on the **Edit Demographics** button to add patient information.



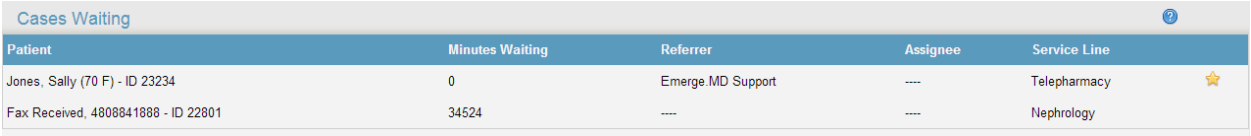


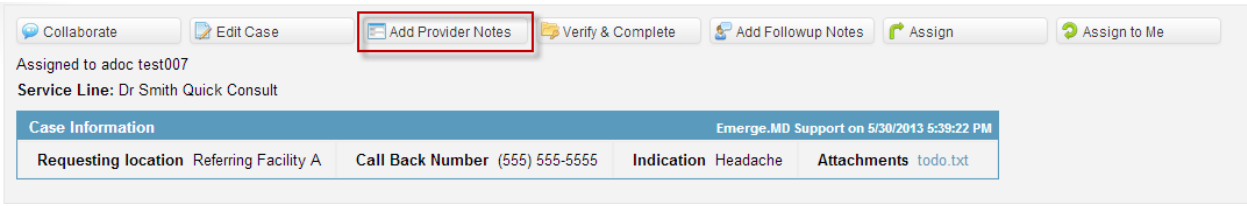
Once you have edited the patient information the case will show under the patient's name as normal.


Smith, Lisa - ID 25767 - Female - 5/12/1965 (48 Years) details »
Case Requested 10/30/2013: Neurology - Aneurysm
Dashboard
Patient Overview
Collaborate
Edit Case
Add Provider Notes
Verify & Complete
Add Followup Notes
Assign
Assign to Me
No one is currently scheduled for this service line. You may want to assign to a specific person.
Service Line: Neurology
Case Information
Emerge.MD Support on 10/30/2013 10:36:11 AM
Indication Aneurysm
A provider has not yet signed this document.

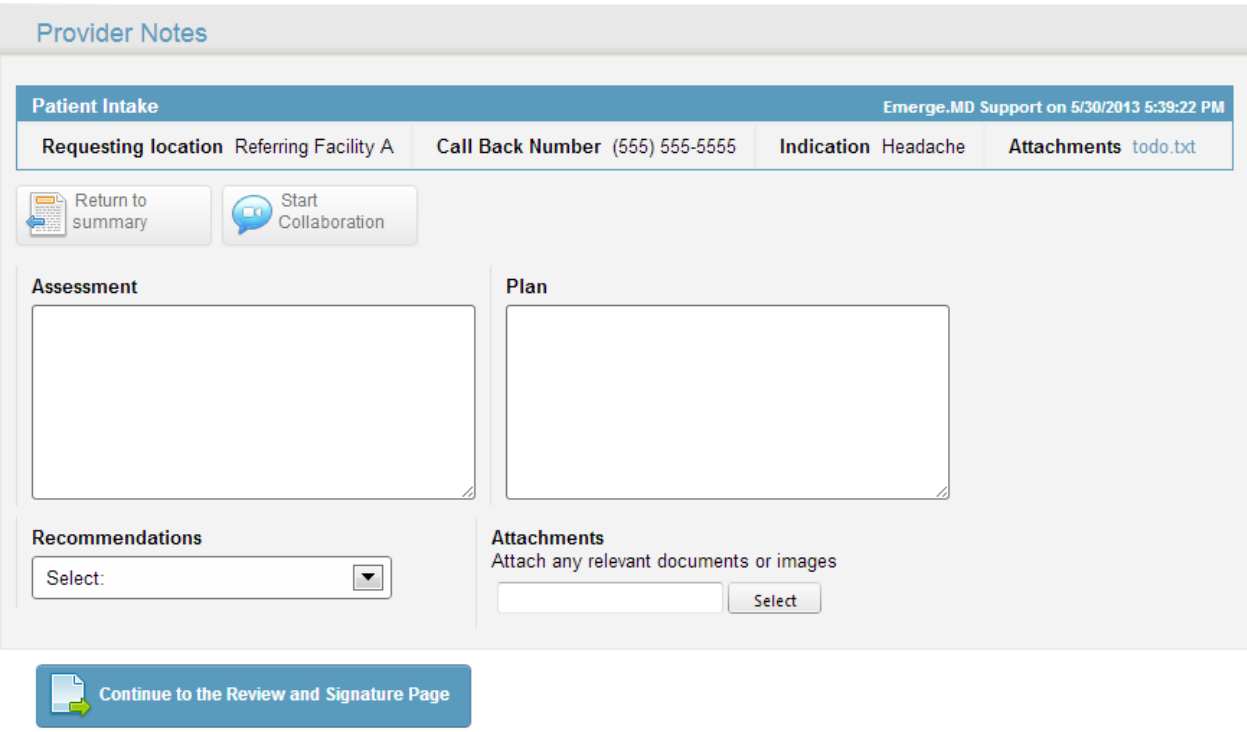
Specialist – Provider Notes

When a case has been submitted to you the case will appear in the **Cases Waiting** queue. Click on the case you wish to review and then click the **Add Provider Notes** button to review and comment on the case. You can also assign the case to someone else or yourself if it hasn't already been assigned to you using the **Assign** and **Assign to Me** buttons.

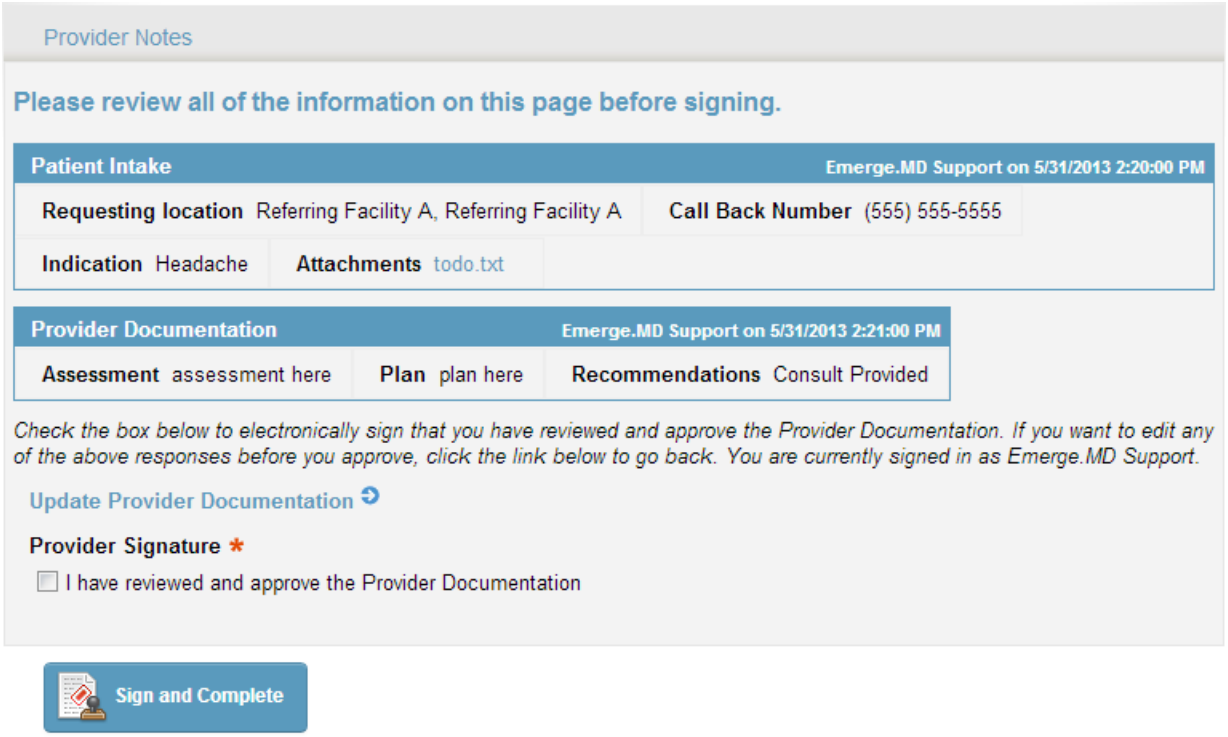




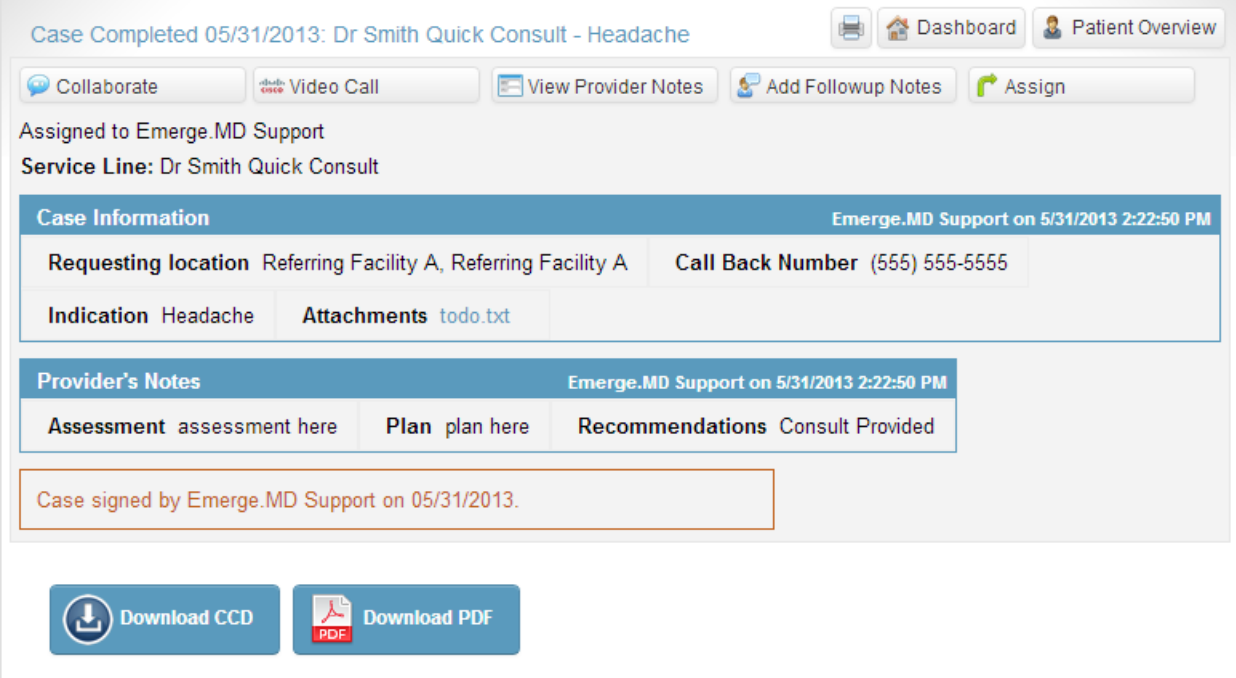
On the provider notes page a summary of the case appears at the top for you to review. If you need to consult with the referring doctor or with anyone else about this case you can do so from this page by clicking on the appropriate button. If you want to return to the previous page you can click on the **Return to summary** button. When you have reviewed the case, fill in the necessary information and click the **Continue to the Review and Signature Page** button to continue.



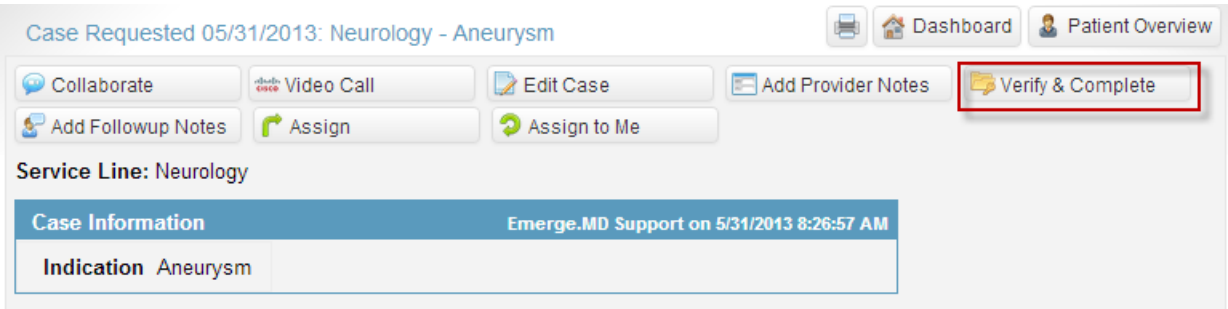
The Review and Signature page contains all of the case information including the notes you made on the case. If you need to alter your notes or recommendation you can click on the **Update Provider Documentation** link to go back and make edits.


Provider Notes
Please review all of the information on this page before signing.
Patient Intake
Emerge.MD Support on 5/31/2013 2:20:00 PM
Requesting location Referring Facility A, Referring Facility A
Call Back Number (555) 555-5555
Indication Headache
Attachments todo.txt
Provider Documentation
Emerge.MD Support on 5/31/2013 2:21:00 PM
Assessment assessment here
Plan plan here
Recommendations Consult Provided
Check the box below to electronically sign that you have reviewed and approve the Provider Documentation. If you want to edit any of the above responses before you approve, click the link below to go back. You are currently signed in as Emerge.MD Support.
Update Provider Documentation
Provider Signature *
I have reviewed and approve the Provider Documentation
Sign and Complete

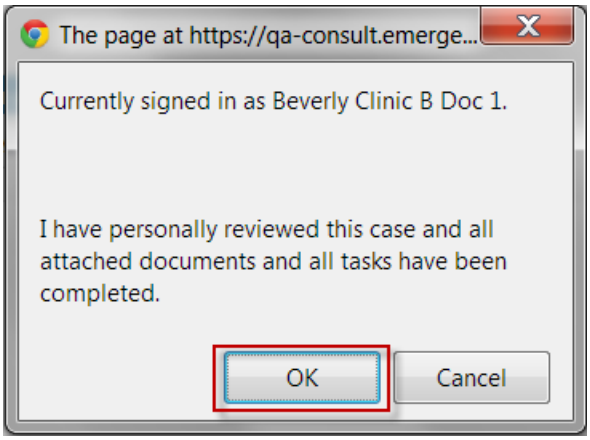
Once you have checked the box to sign, click on the **Sign and Complete** button to submit. After submitting, a final summary of the case will appear that you can download as a CCD or PDF using the **Download CCD** or **Download PDF** buttons.



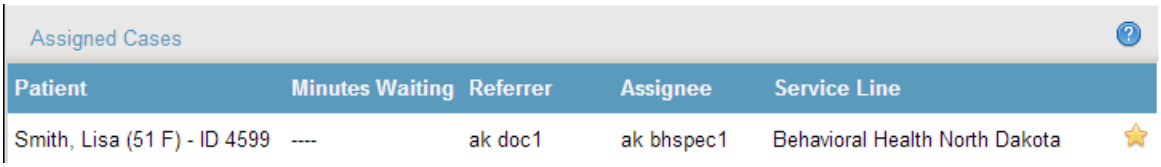
For a quicker turn around, if you have nothing to provide on the provider notes form you can sign and complete the case using the **Verify and Complete** button located on the case summary page.



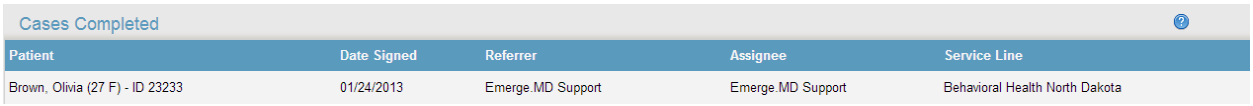
You will be asked to verify your intent to sign off on the case and mark it as completed. Click **OK** to continue. Once you've signed off on the case you will not be able to edit the provider notes form. You can, however, still add notes to the case using the **Add Followup Notes** button.


The page at https://qa-consult.emerge...
Currently signed in as Beverly Clinic B Doc 1.
I have personally reviewed this case and all attached documents and all tasks have been completed.
OK
Cancel

If you begin the provider documentation but do not finish the case will appear in the **Assigned Cases** queue.

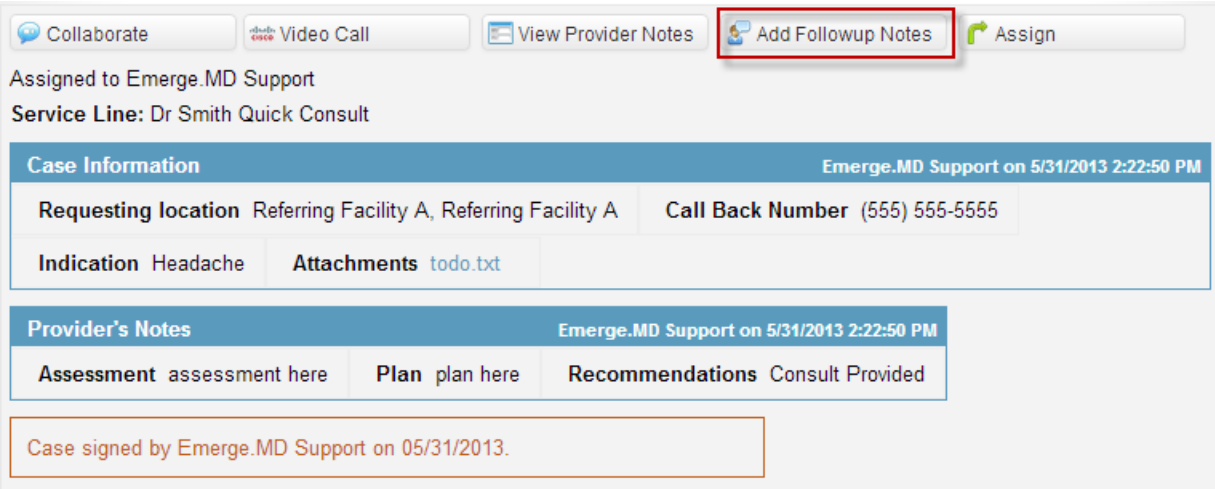


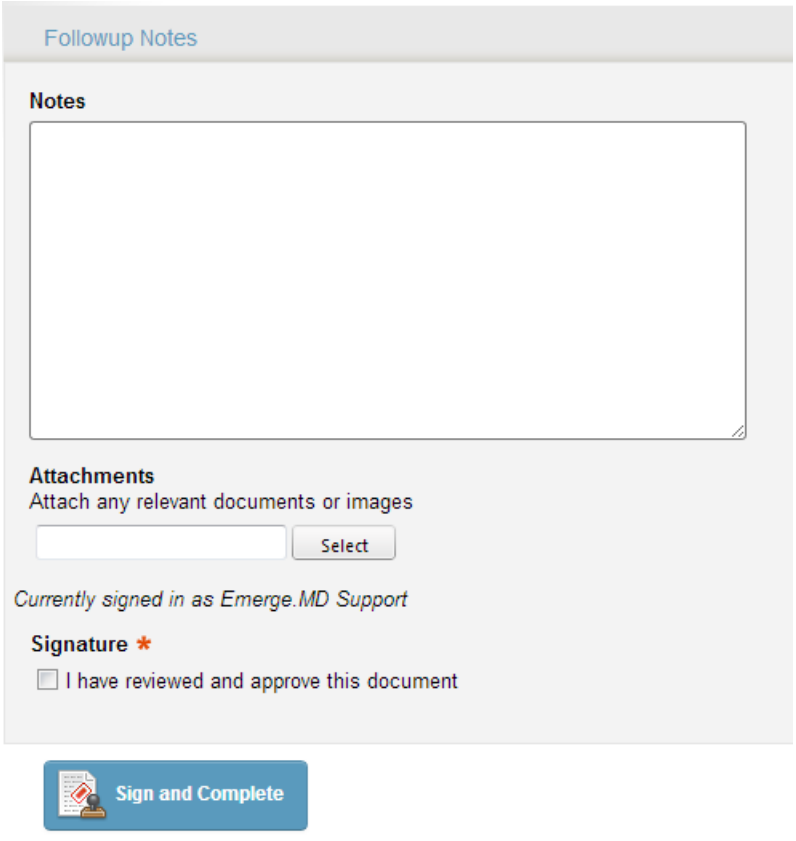
When you sign off on the case the case will then appear in the **Cases Completed** queue.



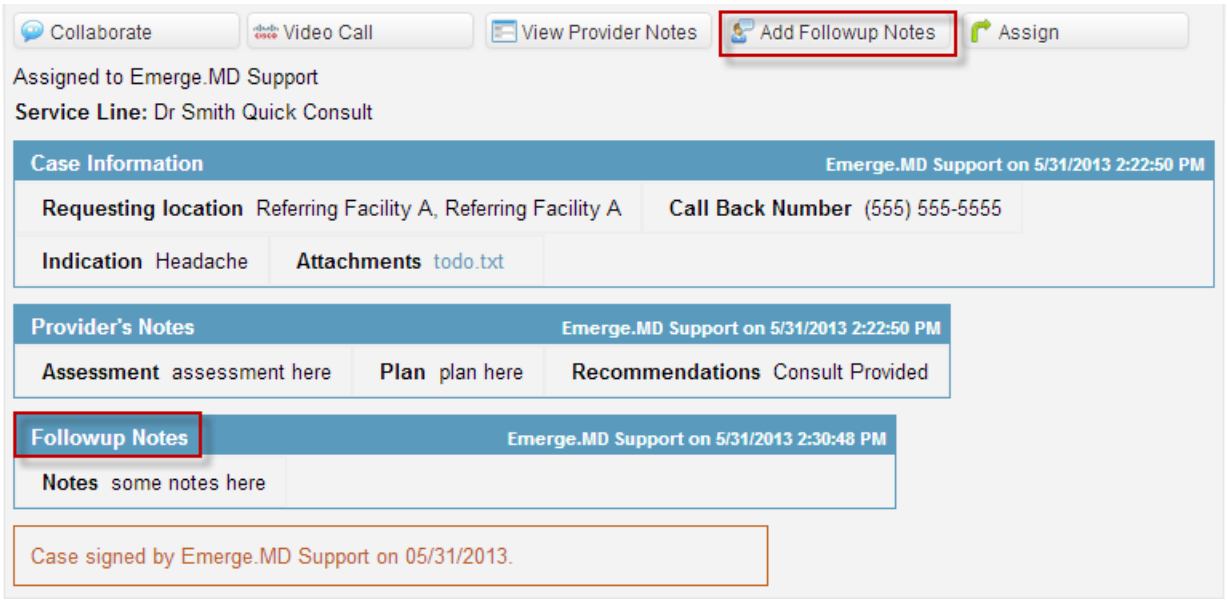
Specialist/Referrer – Followup Notes

Once a doctor has signed a case and it is closed you can still add notes to the case using the followup notes form. Click on the **Add Followup Notes** button from the case summary page to append notes to a case. Add your notes and check the box to sign off on them and then click on the **Complete** button at the bottom of the page to save the information.



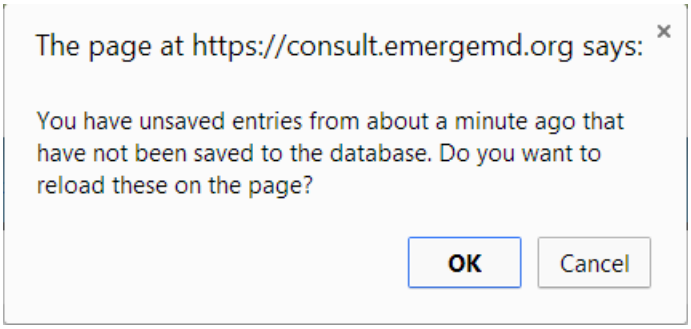


Once saved you can view the followup notes on the case summary page. You can also add more notes from here using the **Add Followup Notes** button.


Collaborate
Video Call
View Provider Notes
Add Followup Notes
Assign
Assigned to Emerge.MD Support
Service Line: Dr Smith Quick Consult
Case Information
Emerge.MD Support on 5/31/2013 2:22:50 PM
Requesting location Referring Facility A, Referring Facility A
Call Back Number (555) 555-5555
Indication Headache
Attachments todo.txt
Provider's Notes
Emerge.MD Support on 5/31/2013 2:22:50 PM
Assessment assessment here
Plan plan here
Recommendations Consult Provided
Followup Notes
Emerge.MD Support on 5/31/2013 2:30:48 PM
Notes some notes here
Case signed by Emerge.MD Support on 05/31/2013.

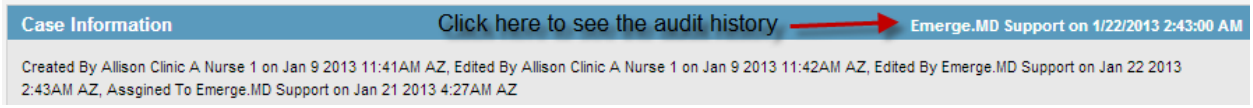
Unsaved Form Entries

When entering documentation into any form within the application the information is saved automatically as you type. If you lose connectivity or your browser crashes before you **Save and Continue**, when you return to the page you will be prompted to reload your unsaved entries. However, this does not apply to any identifying patient health information. To ensure HIPAA compliance patient identifying data is not stored locally in browser memory.


The page at https://consult.emergemd.org says:
You have unsaved entries from about a minute ago that have not been saved to the database. Do you want to reload these on the page?
OK
Cancel

Reviewing the Audit History

You can see a full history of edits made to a patient's account from the case summary page. In the top right corner of each summary box is the information for the last edit made. Click on the text to see a full history.

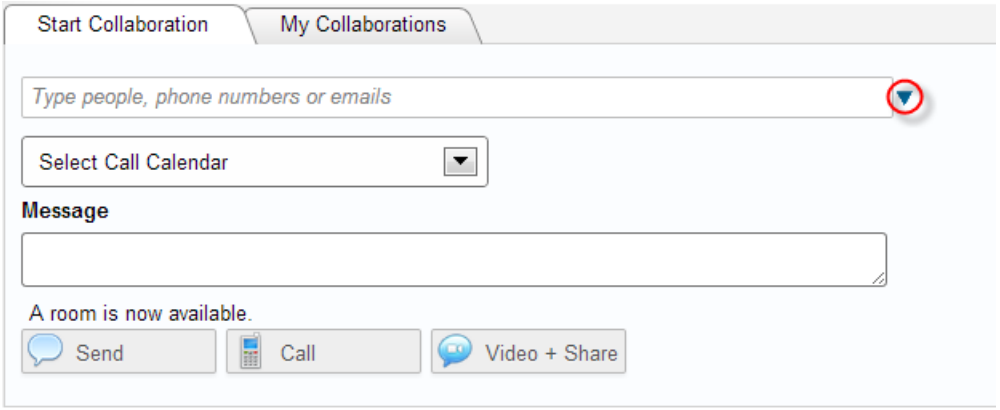

Case Information
Click here to see the audit history
Emerge.MD Support on 1/22/2013 2:43:00 AM
Created By Allison Clinic A Nurse 1 on Jan 9 2013 11:41AM AZ, Edited By Allison Clinic A Nurse 1 on Jan 9 2013 11:42AM AZ, Edited By Emerge.MD Support on Jan 22 2013 2:43AM AZ, Assgined To Emerge.MD Support on Jan 21 2013 4:27AM AZ

Starting a Collaboration

The first step to starting a collaboration is to invite attendees. There are four ways to invite attendees.

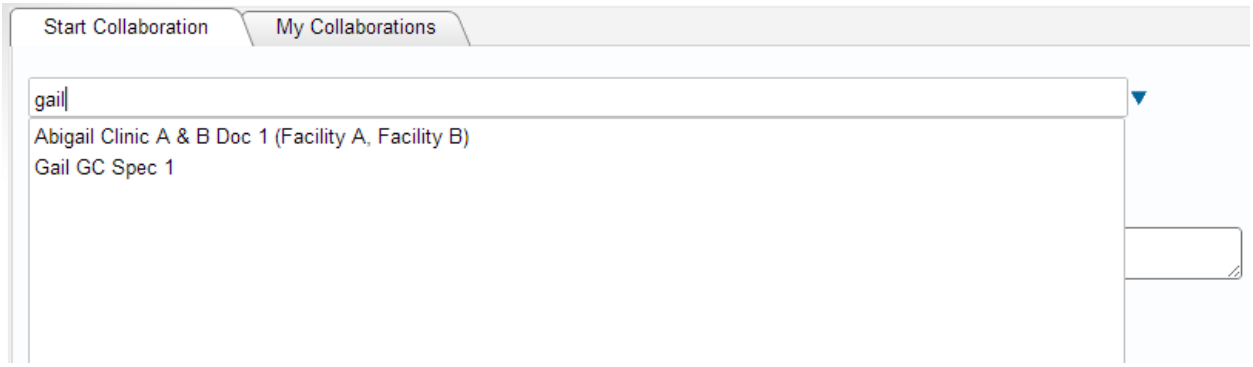
Selecting Attendees from List

Click on the small blue triangle to view the drop down list showing all available attendees. These are attendees that are registered in your Consult Accelerator site. Scroll through the list to select the desired attendee(s). The names appear alphabetically by first name.



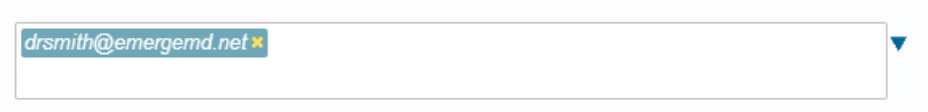
Searching for Attendees by Name

Begin by typing an attendee's name. In this example, the first three letters of *Gail* were typed – *"Gai"*. Matches to the typed letters will appear in a drop down list below the line. You may continue typing to reduce your matches or scroll through the list to find the attendee. Stopping at three letters returned two potential matches.



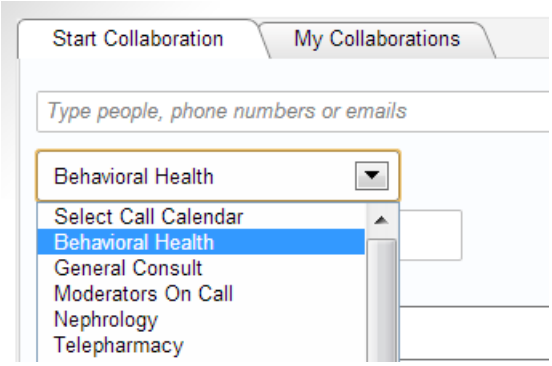
Entering Email Addresses and/or SMS Numbers

You can enter an email address or SMS number directly onto the line. This is used for inviting attendees who are not registered in your Consult Accelerator site.

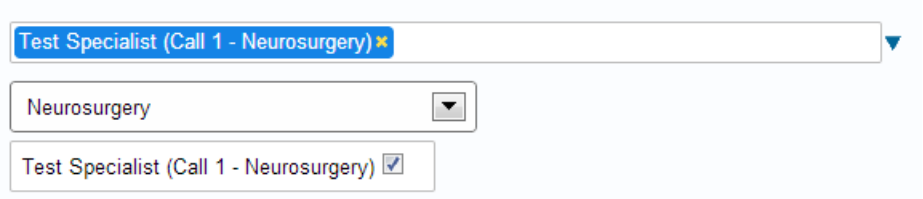


Provider Call Calendar

You can select from the available providers who are currently on call by selecting a Call Calendar from the drop down list. The *Behavioral Health* calendar is selected for this example.



A list of available providers who are on call for the selected calendar will appear below the Call Calendar drop down. Select the provider by checking the check box next to their name. When you click the check box, the provider's name will appear in the **Invite Attendees** box.

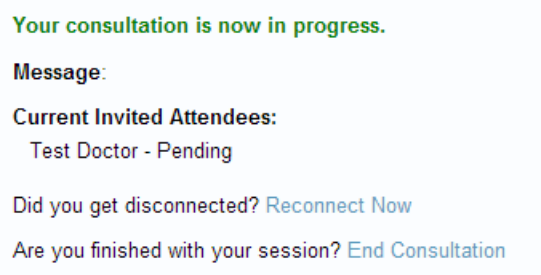


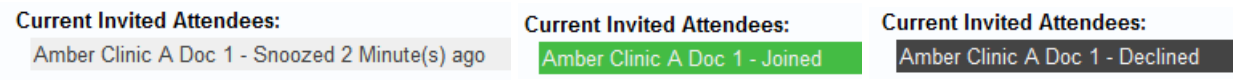
If you wish to remove an attendee from the list click the yellow **x** next to an attendee's name, email address or phone number. You can enter information for the attendees in the **Message** box. Once you have created your list of attendees you can send a message, start a phone call, or start a collaboration session.

Starting a Video Session

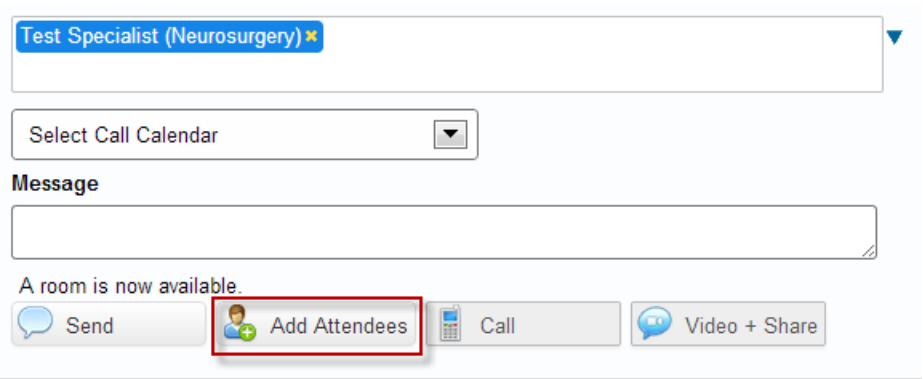
There are three places in the application where you can start an audio/video session. The meeting module on the main dashboard page, from inside the physician documentation form, and from the Case Summary page.

To begin an audio/video session from the meeting module you would invite attendees using one of the methods explained above and click on the **Video + Share** button. The meeting will begin and notifications will be sent to the attendees. The meeting module will also switch to displaying the status of the consultation. You can see the status of the invited attendees. The status is Pending if the attendee has not responded at all, it will switch to Snoozed if the attendee chose to put the session on hold and join later, Joined if they chose to join the session and Declined if they were not available to join the session.

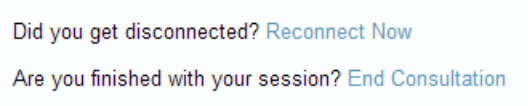

Your consultation is now in progress.
Message:
Current Invited Attendees:
Test Doctor - Pending
Did you get disconnected? Reconnect Now
Are you finished with your session? End Consultation


Current Invited Attendees:
Amber Clinic A Doc 1 - Snoozed 2 Minute(s) ago
Current Invited Attendees:
Amber Clinic A Doc 1 - Joined
Current Invited Attendees:
Amber Clinic A Doc 1 - Declined

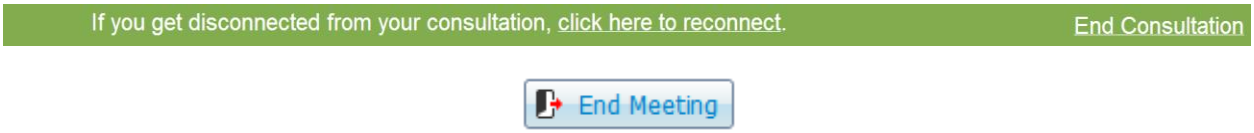
You can also invite more attendees by selecting people in the same manner as the initial invite and then clicking on the **Add Attendees** button.



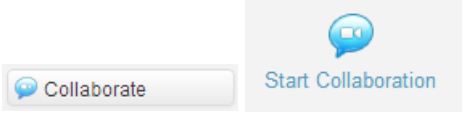
Finally, you can reconnect to your session if necessary using the **Reconnect Now** button and end your session using the **End Consultation** button.



You can also reconnect and end your session from the green bar at the bottom of the application or click the **End Meeting** button in the bottom right-hand side of the meeting window.



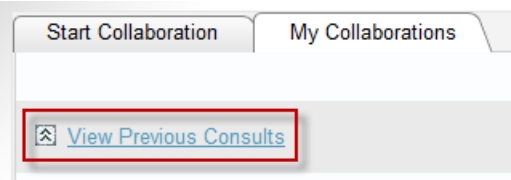
To begin an audio/video session from the case summary page or from inside the physician documentation form click the **Collaborate** or **Start Collaboration** button.



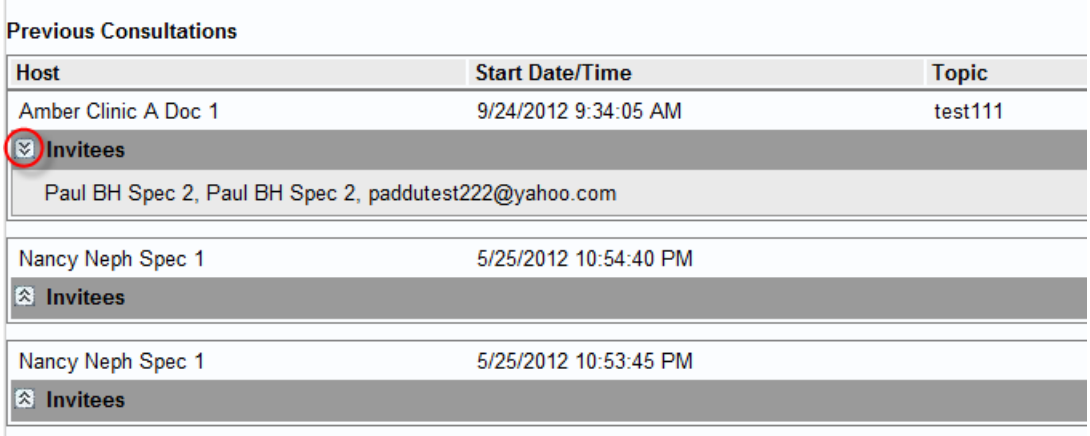
The Invite Attendees window will pop up and you invite attendees in the same manner as you would from the meeting module on the dashboard page. When you've selected attendees click the **Video + Share** button to start the session.

If the logged in user does not have a license to begin video consults the **Video + Share** button will be grayed out and unusable. They will still be able to send messages and start voice calls.

To view a log of all your consultations click on the **My Collaborations** tab of the meeting module. Then click on the **View Previous Consults** button to view your consultations.



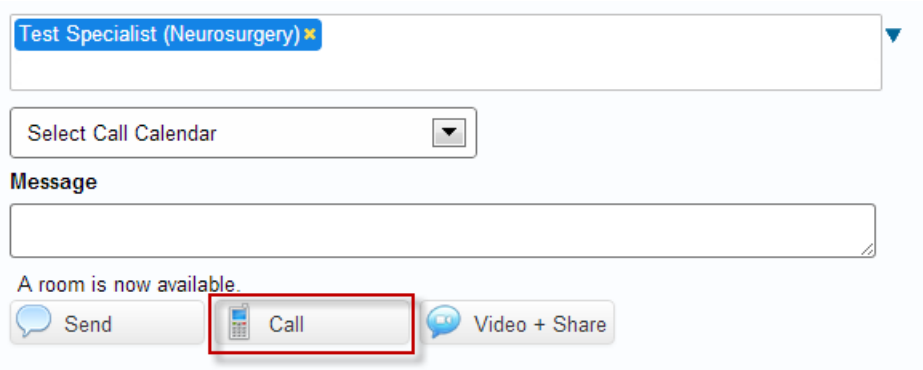
You can see consults you initiated as well as consults others invited you to. The initiator is listed under Host and the other attendees under Invitees. Click the down arrows next to Invitees to see the list of attendees for each session.

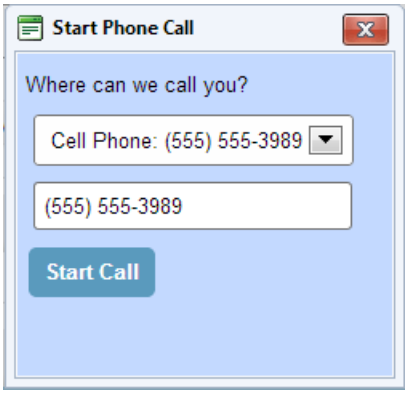


Starting a Phone Call

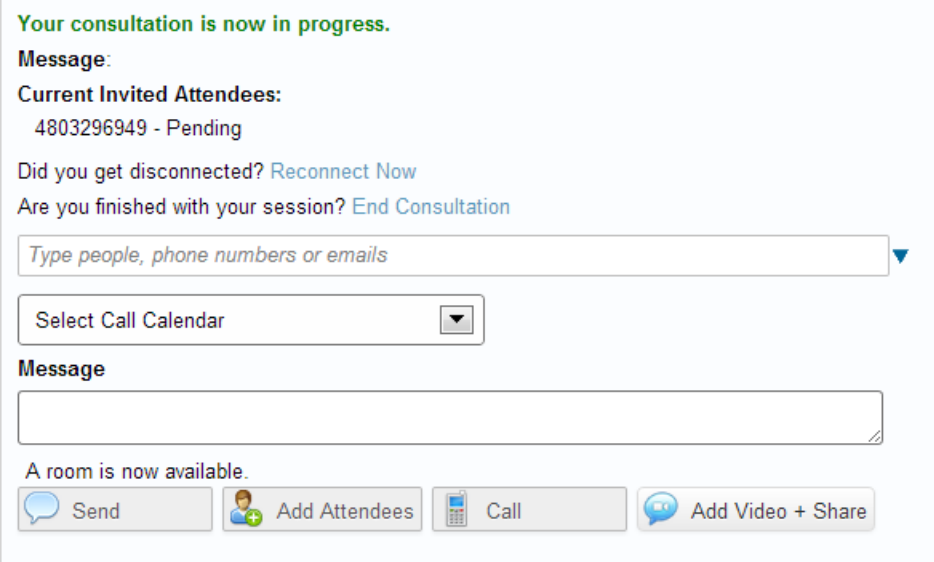
There are three places in the application where you can start a phone call. The meeting module on the main dashboard page, from inside the physician documentation form, and from the Case Summary page.

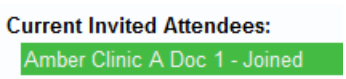
To begin a phone call from the meeting module you would invite attendees using one of the methods explained above and click on the **Call** button. A pop up window will appear asking for a phone number to call you at. You can select from the list of numbers you have associated with your account or you can enter a new number. Once you have entered your number click on the **Start Call** button to start the call. The system will call you and when you have answered, it will call the invited attendees. The attendees will also receive a text message containing a link they can use to reconnect to the call if necessary.



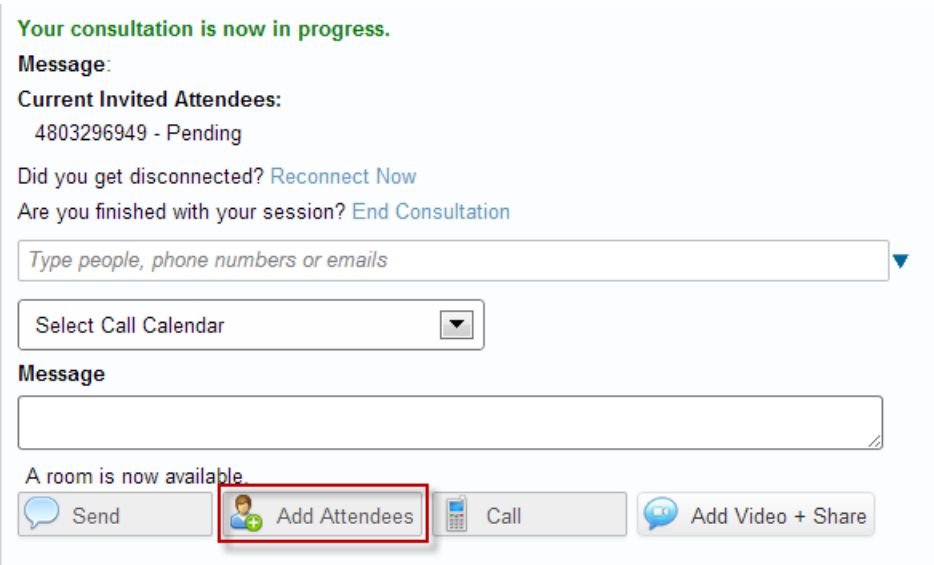


Once the call has started the meeting module will switch to displaying the status of the call. You can see the status of each of the invited attendees. The status will say Pending until the attendee joins the call. Once they have joined the status will switch to Joined.



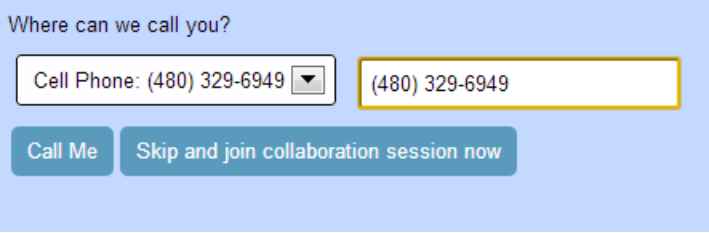


You can add others to the call by selecting them in the same manner as the initial invite. Once you have selected the additional attendees click on the **Add Attendees** button to invite them.

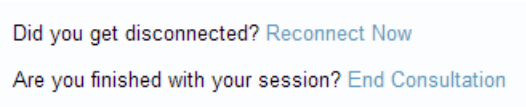


You can turn your phone call into a video session by clicking on the **Add Video + Share** button.

This will start a meeting session on your computer and send out an invite to the attendees on the call. When an attendee clicks to join the session they will be given the option of being called or skipping to the session. Clicking **Skip and join collaboration session now** will join them to the meeting.

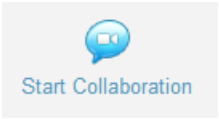


Finally, you can reconnect to your session if necessary using the **Reconnect Now** button and end your session using the **End Consultation** button. When you end the meeting it will end the phone call as well.



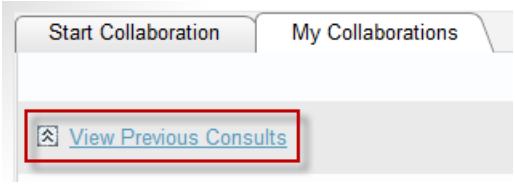
You can also reconnect and end your session from the green bar at the bottom of the application.

To begin a phone call from inside the physician documentation form or from the case summary page click the **Start Collaboration** button.

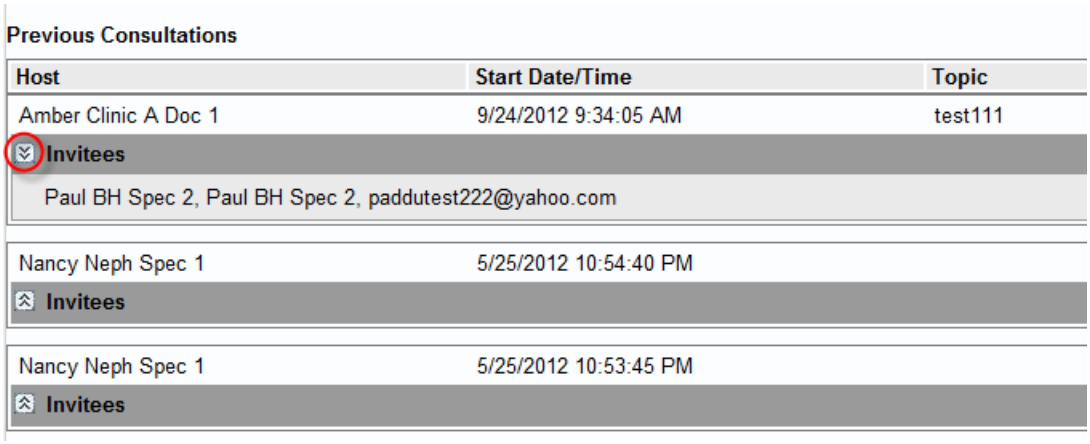


The Invite Attendees window will pop up and you invite attendees in the same manner as you would from the meeting module on the dashboard page. When you've selected attendees click the **Call** button to start the call.

To view a log of all your calls click on the **My Collaborations** tab of the meeting module. Then click on the **View Previous Consults** button to view your calls.

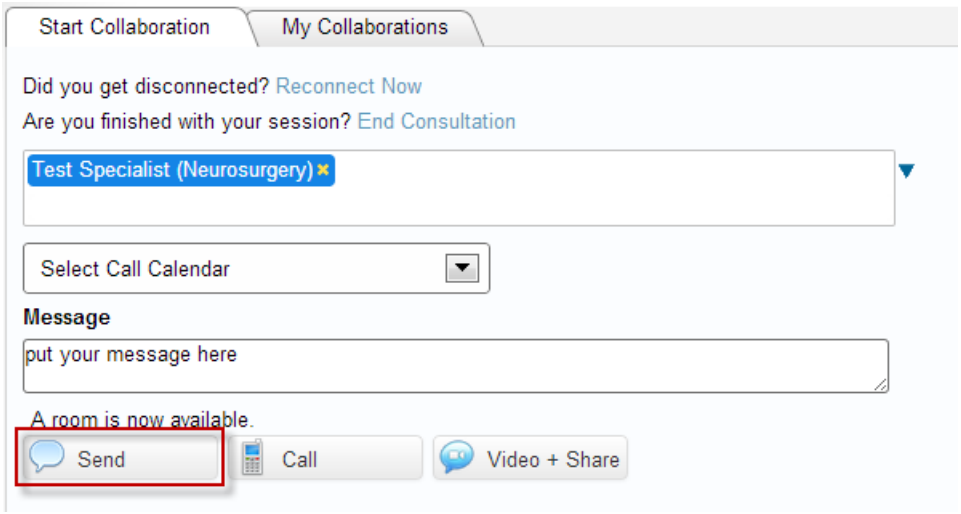


You can see calls you initiated as well as calls others invited you to. The initiator is listed under Host and the other attendees under Invitees. Click the down arrows next to Invitees to see the list of attendees for each call.

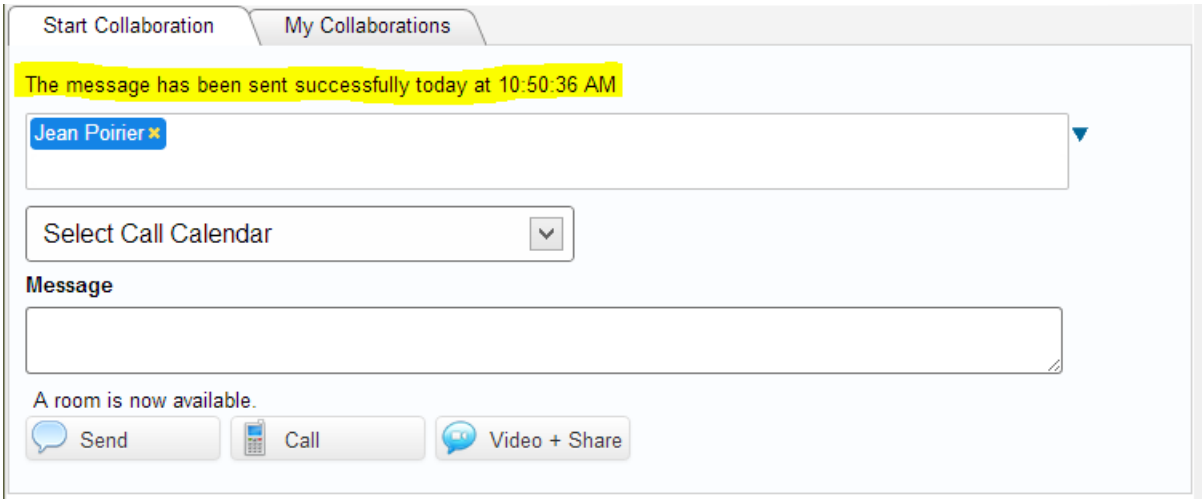

Previous Consultations
Host
Start Date/Time
Topic
Amber Clinic A Doc 1
9/24/2012 9:34:05 AM
test111
Invitees
Paul BH Spec 2, Paul BH Spec 2, paddutest222@yahoo.com
Nancy Neph Spec 1
5/25/2012 10:54:40 PM
Invitees
Nancy Neph Spec 1
5/25/2012 10:53:45 PM
Invitees

Sending a Message

Another means of communication within the application is the send message functionality. To send a message from the meeting module you would select recipients using one of the methods explained above for inviting attendees to a call or collaboration and then click on the **Send** button.

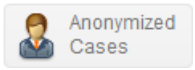


If you wish to remove a recipient from the list click the yellow **x** next to the recipient's name, email address or phone number. Once you have selected your recipient(s) type your message in the **Message** box and click on the **Send** button. You will receive verification that the message was sent successfully. Please note the recipient will not be able to reply directly to this message.



View Anonymized Cases

To view cases anonymously click on the **Anonymized Cases** button at the top of the page.



This will display the queues on the dashboard page by the patient's User ID rather than by the patient's name.

Cases Waiting (Anonymized)

UserID	Age	Sex	Referrer	Assignee	Service Line
23234	70	Female	Emerge.MD Support	----	Telepharmacy
22801	----	----	----	----	Nephrology

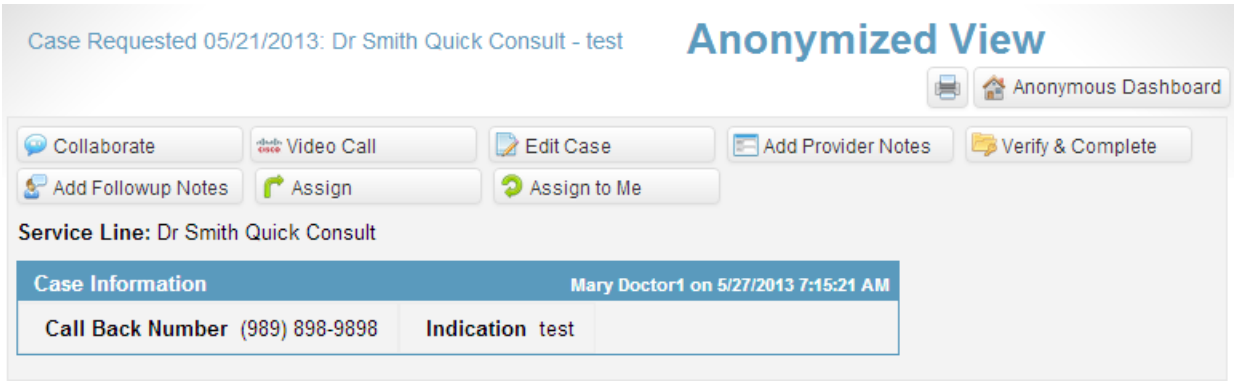
Cases Under Review (Anonymized)

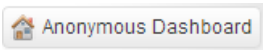
UserID	Age	Sex	Referrer	Assignee	Service Line
23027	30	Male	Emerge.MD Support	Emerge.MD Support	Behavioral Health North Dakota
22792	0	Male	Emerge.MD Support	Emerge.MD Support	Behavioral Health North Dakota
23031	0	Female	Emerge.MD Support	Emerge.MD Support	Nephrology
23004	49	Female	Betty Clinic B Nurse 1	Ned Neph Spec 2	Nephrology

Cases Completed (Anonymized)

UserID	Age	Sex	Date Signed	Referrer	Assignee	Service Line
23029	30	Male	01/24/2013	Emerge.MD Support	Emerge.MD Support	Behavioral Health North Dakota
23233	27	Female	01/24/2013	Emerge.MD Support	Emerge.MD Support	Behavioral Health North Dakota
23007	18	Male	01/15/2013	Emerge.MD Support	Nancy Neph Spec 1	Nephrology

When you click on a patient in the queue you will be taken to a summary of the patient's case that is also anonymized.



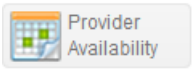
To return to the anonymized dashboard click on the 

button.

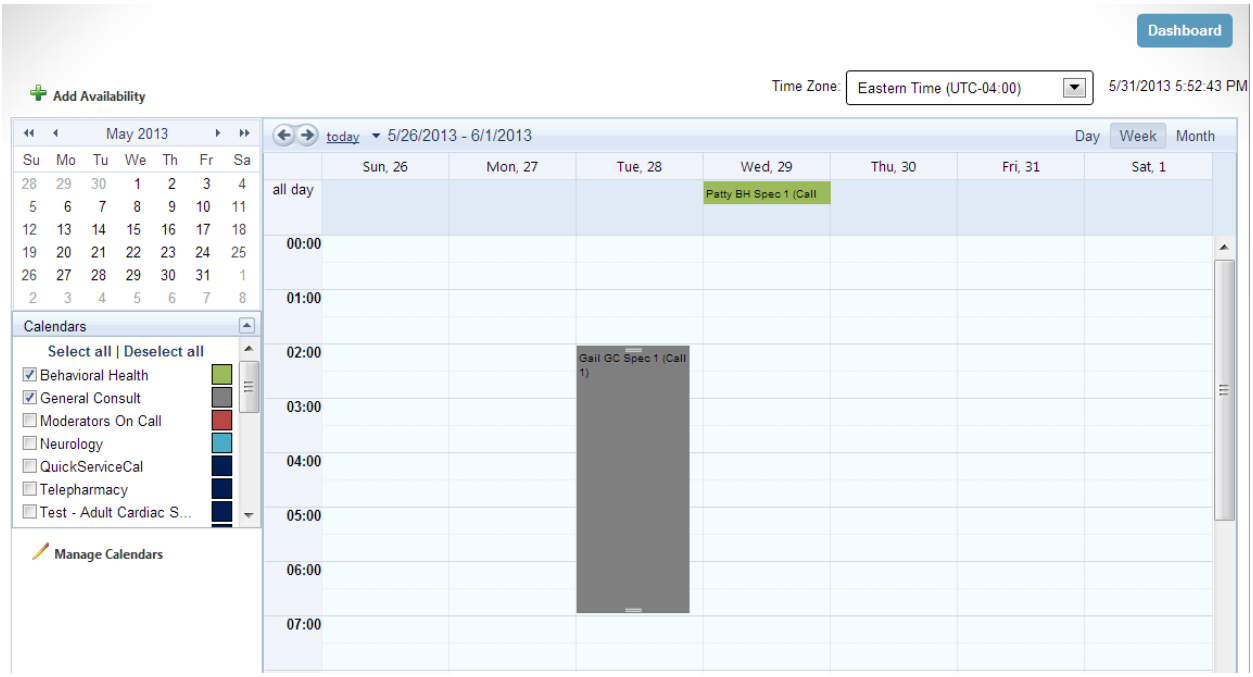
Provider Availability Scheduler

The Provider Availability Scheduler is a management tool for Providers of Service Lines to maintain their On Call times. A Provider who is scheduled On Call will receive email/SMS/pager alerts for various events, such as the submission of a referral case.

Begin by clicking the **Provider Availability** button from the top of the page.

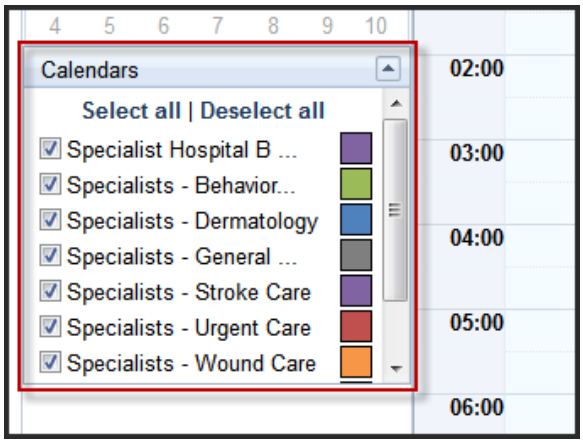


You will be brought to the **Provider Availability** page.



The small calendar in the upper-left corner will allow you to quickly and easily navigate through the days, weeks and months to get to your desired date.

The Calendars list will show you all of the calendars that are available for you to view. You can control which ones you would like to view by checking the corresponding check boxes. These add layers to your calendar. Having all boxes checked will show all Providers and all Service Lines on your main calendar.



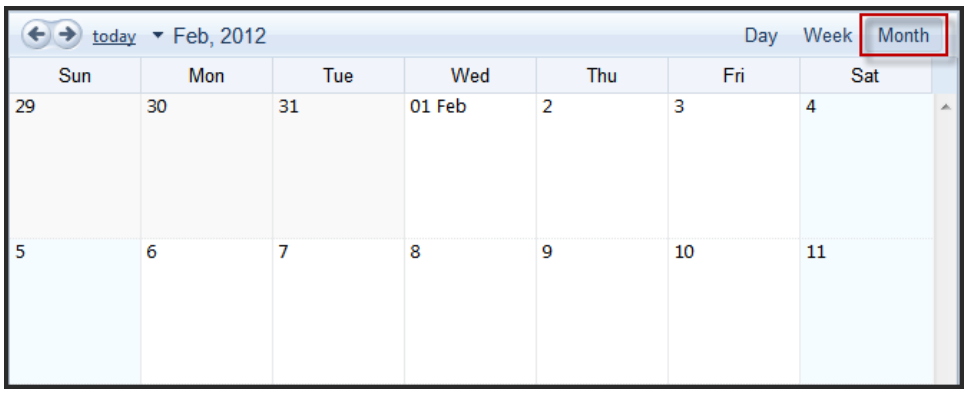
The Time Zone drop-down will give you a list of all available time zones for North America. The name of the time zone and the UTC offset is listed in the drop-down. The current date and time of that zone is displayed on the right.

The Day/Week/Month views are toggled by clicking on them. The Week view is displayed by default.

Week View:

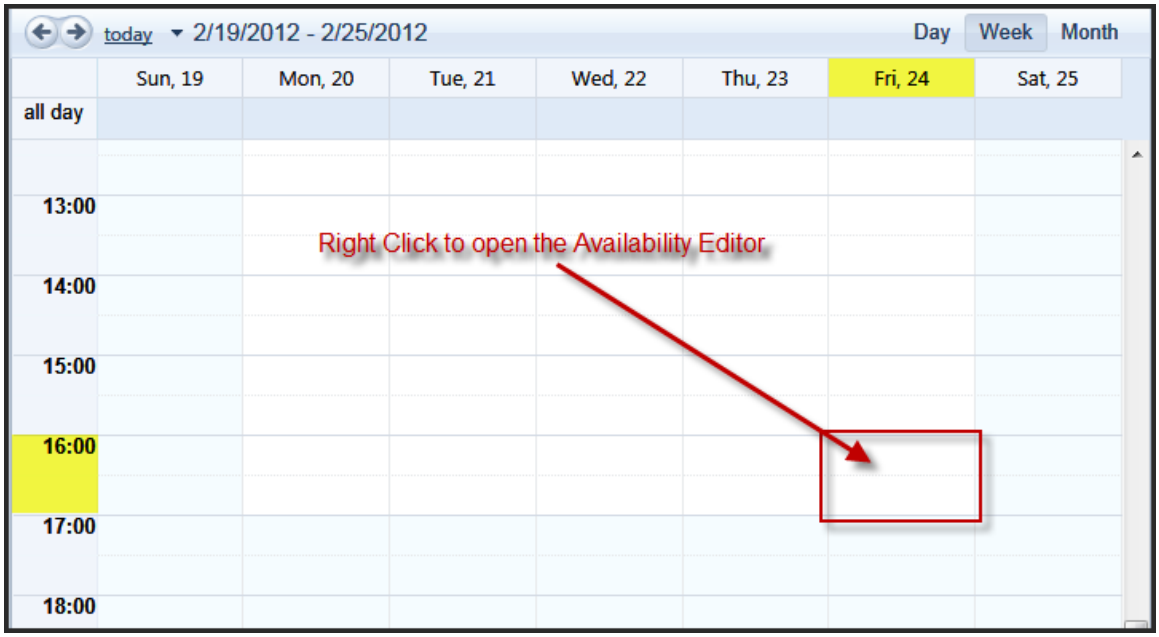
Day View:

Month View:

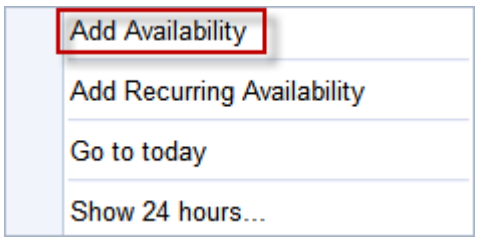


Create a new On Call Availability

Locate the date and time that you wish to add availability. In the example below, the date *Fri, 24* at *16:00* was selected.

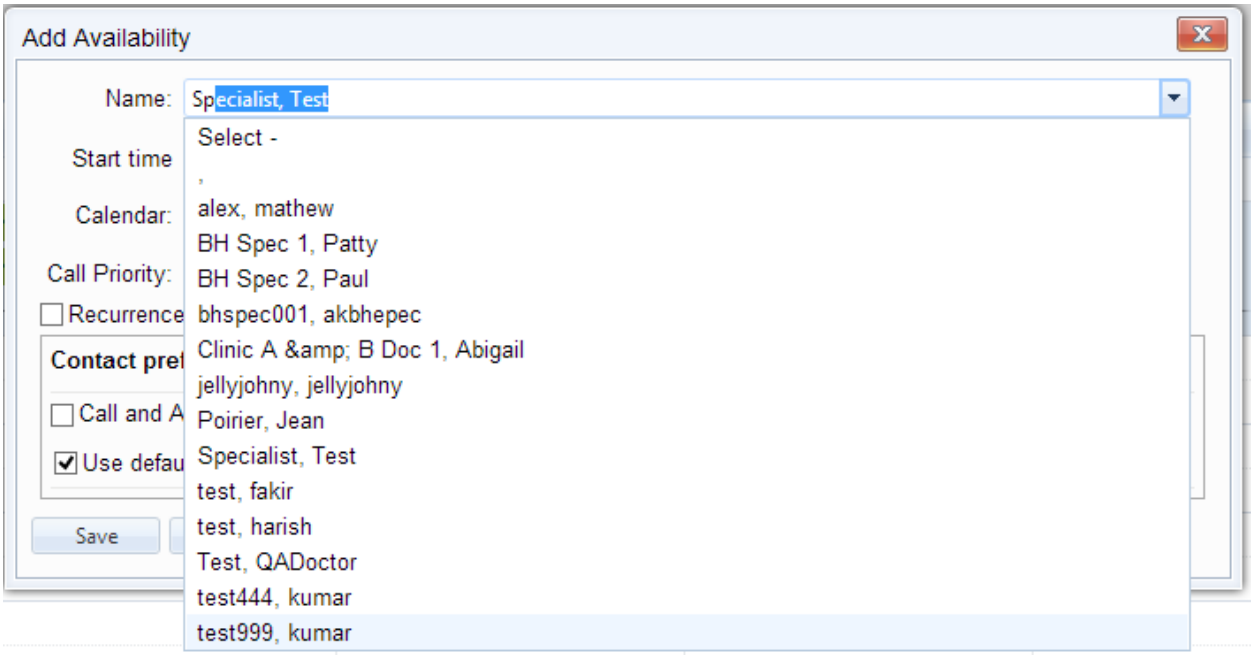


After right-clicking, choose **Add Availability** from the menu.

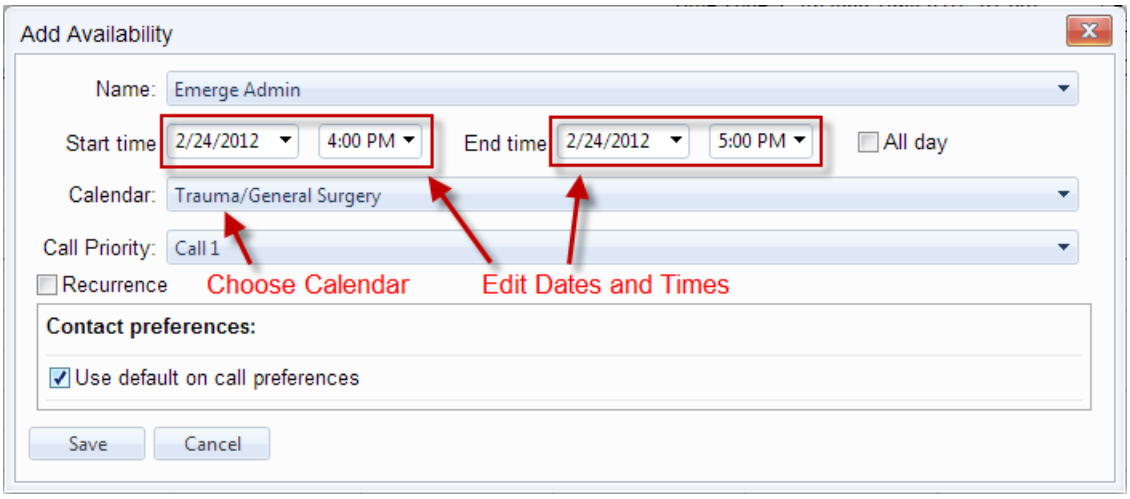


From the Availability Editor, you should first select the name of the individual you want to schedule an availability for. You can select from the drop list or start typing a name to use the auto-complete function. When typing in a name start with the user's last name. If you don't see the name of the person you wish to schedule you may need to change the calendar first to the appropriate service line.

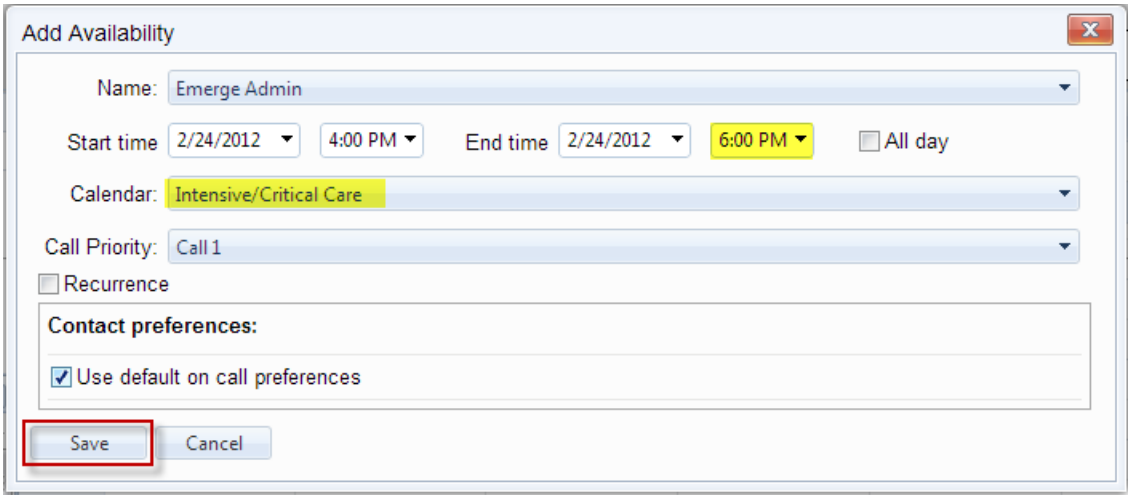
The name drop down filters based on membership in the service line group associated with each calendar.



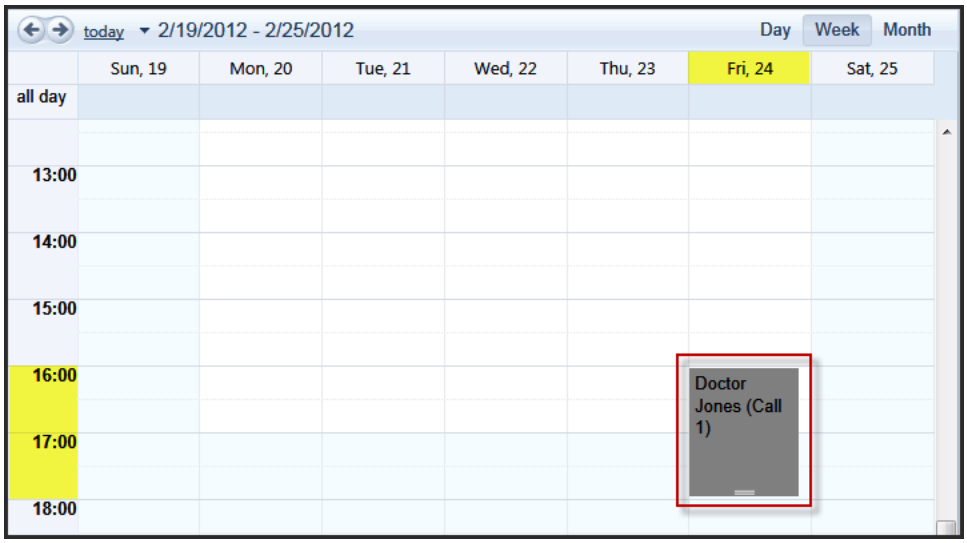
Next you can select a calendar and then edit the Start and End Times.



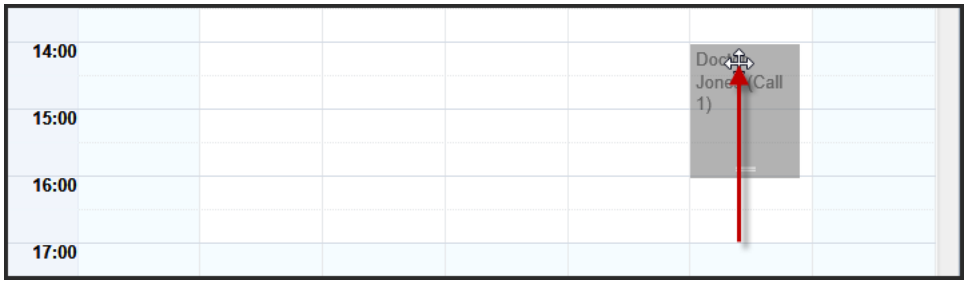
The Calendar was changed to *Intensive/Critical Care* and the End time was changed to *6:00 PM*. Click the **Save** button when you are finished.



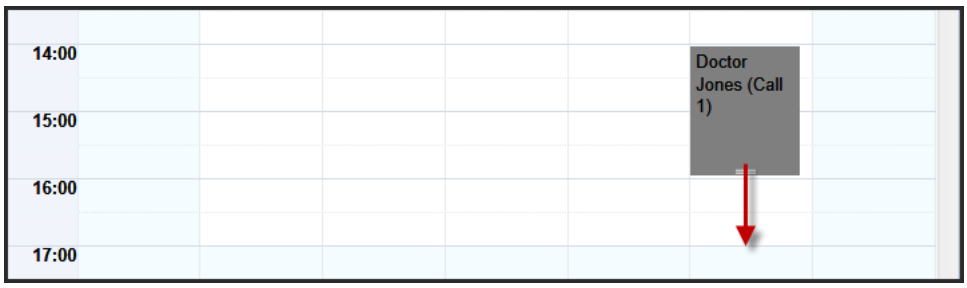
After the availability is saved, you are taken back to the Availability Calendar. You can now see the availability on this calendar.



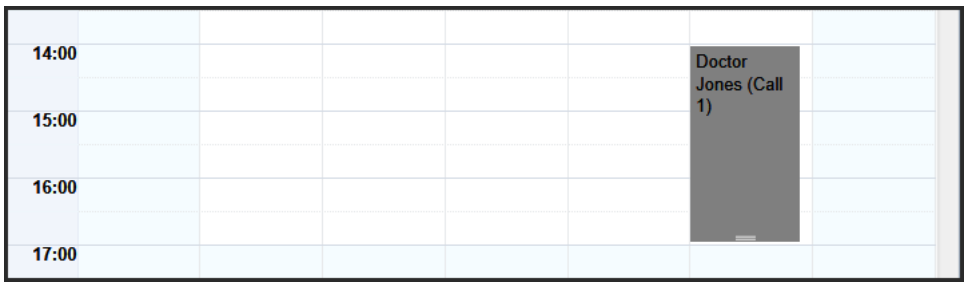
You can easily move the availability by clicking and dragging the availability to another time slot. Below, the availability was dragged from the 16:00 time slot to the 14:00 time slot.



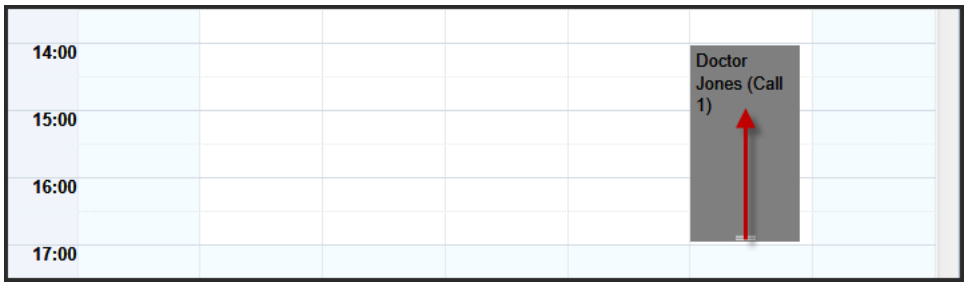
Availabilities can quickly be edited by clicking the bar on the bottom and dragging down to extend or up to reduce the length of the availability.



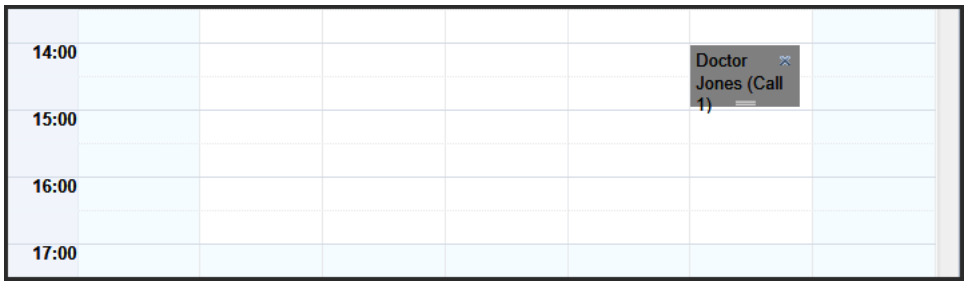
The availability was extended by an hour.



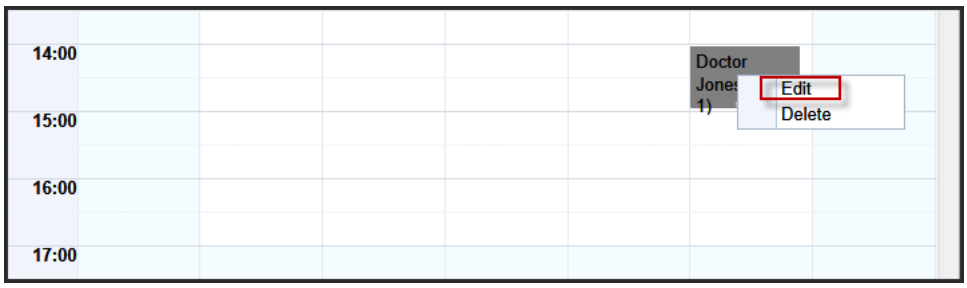
Reduce availabilities in the same manner.



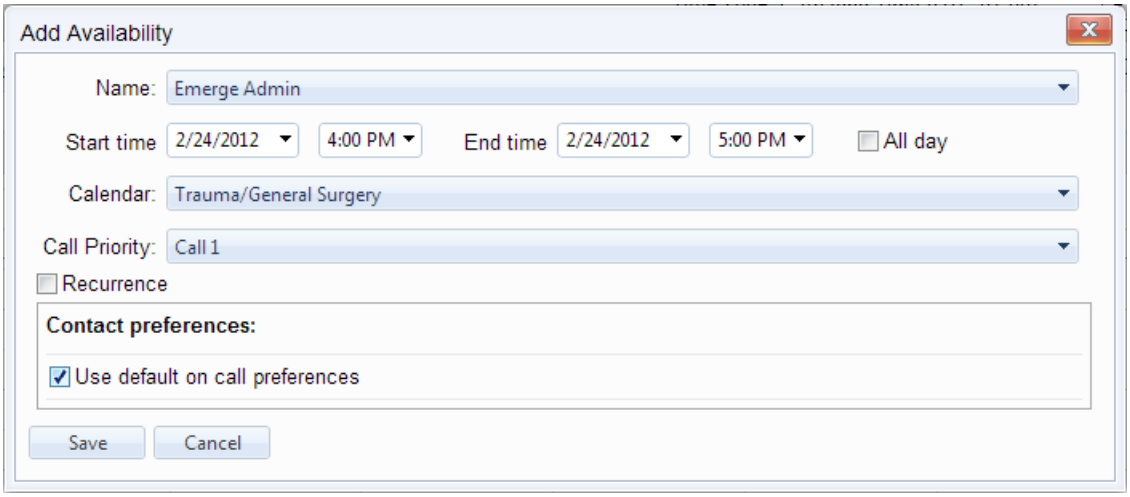
This availability was reduced to an hour.



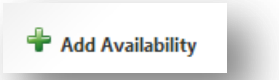
To edit a scheduled availability, right-click the availability and select **Edit**.



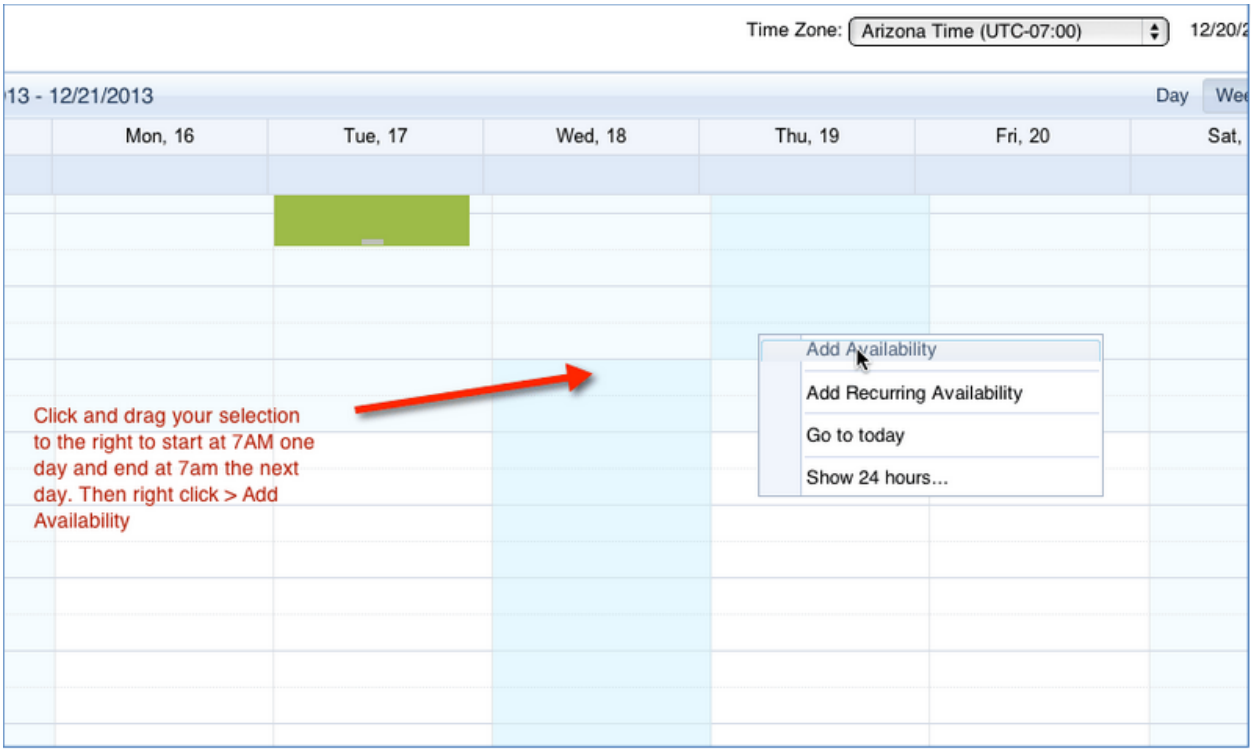
This will open the availability selector.



You can also add availability by clicking on the **Add Availability** button in the top left corner or by double clicking a section of the main calendar.

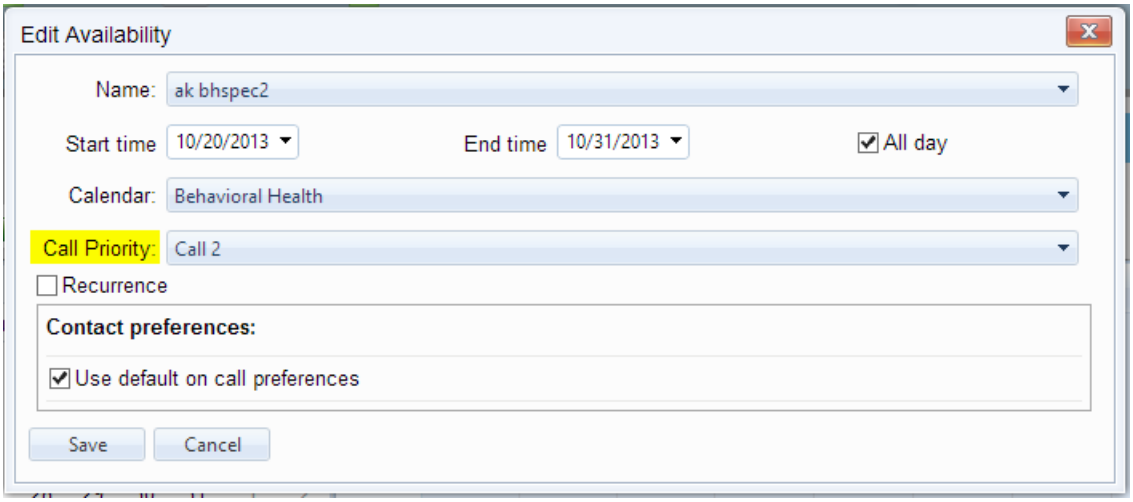


Finally, you can add an availability by clicking and dragging to select a block of time and then right clicking the selected block and selecting **Add Availability**.


Time Zone: Arizona Time (UTC-07:00)
13 - 12/21/2013
Day
Mon, 16
Tue, 17
Wed, 18
Thu, 19
Fri, 20
Sat,
Add Availability
Add Recurring Availability
Go to today
Show 24 hours...
Click and drag your selection to the right to start at 7AM one day and end at 7am the next day. Then right click > Add Availability

Call Priority

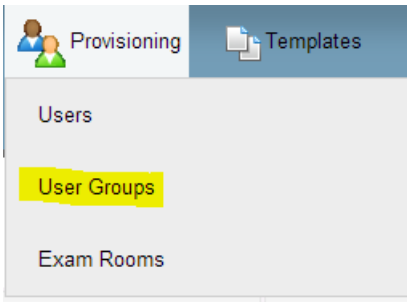
When you put someone on the call calendar you can set their Call Priority from the dropdown menu.

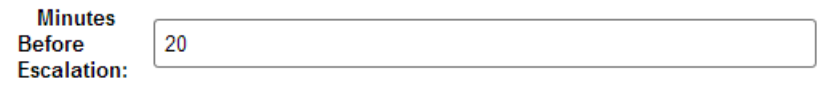


When notifications are sent to the provider on call they will use this call priority. The notification will be sent first to Call 1 and if not answered in a set amount of time will then send to Call 2 and so on. When there are no more providers on call the notification would then be sent to the group owner or owners for the given service line.

The amount of time before the notification escalates to the next person on call can be set in the Service Line Group. Thus the time to escalation is specific to a service line.

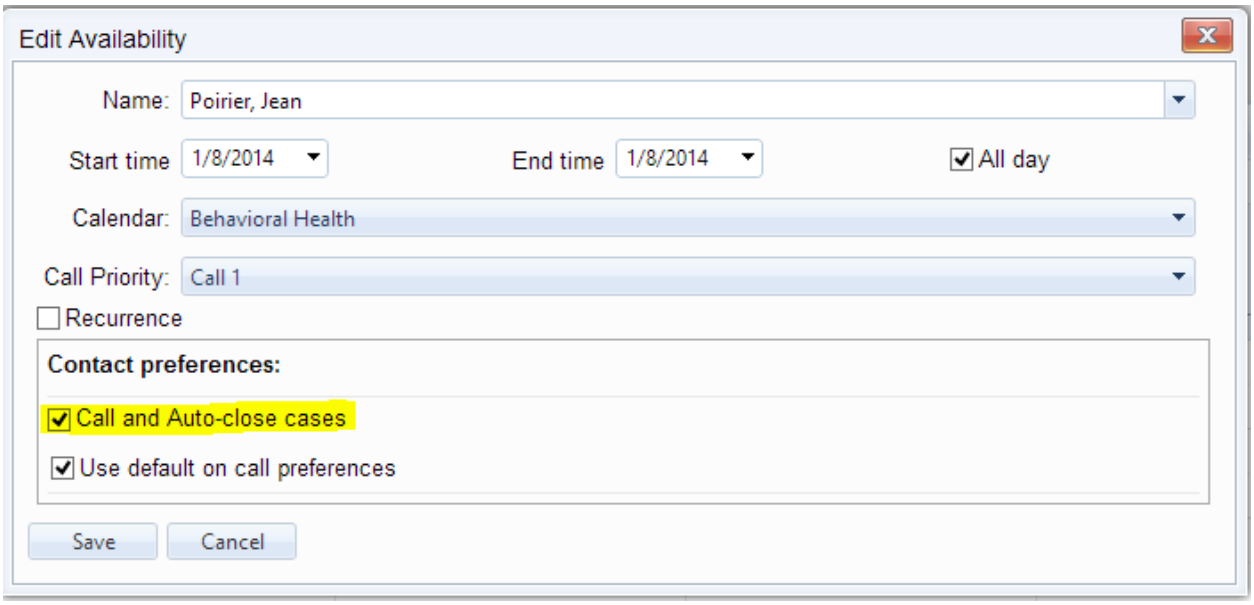
To set the escalation time click on **Provisioning** and then **User Groups** and then click the **Edit** button next to the Service Line Group you wish to set. Set the time in minutes in the box **Minutes Before Escalation**.

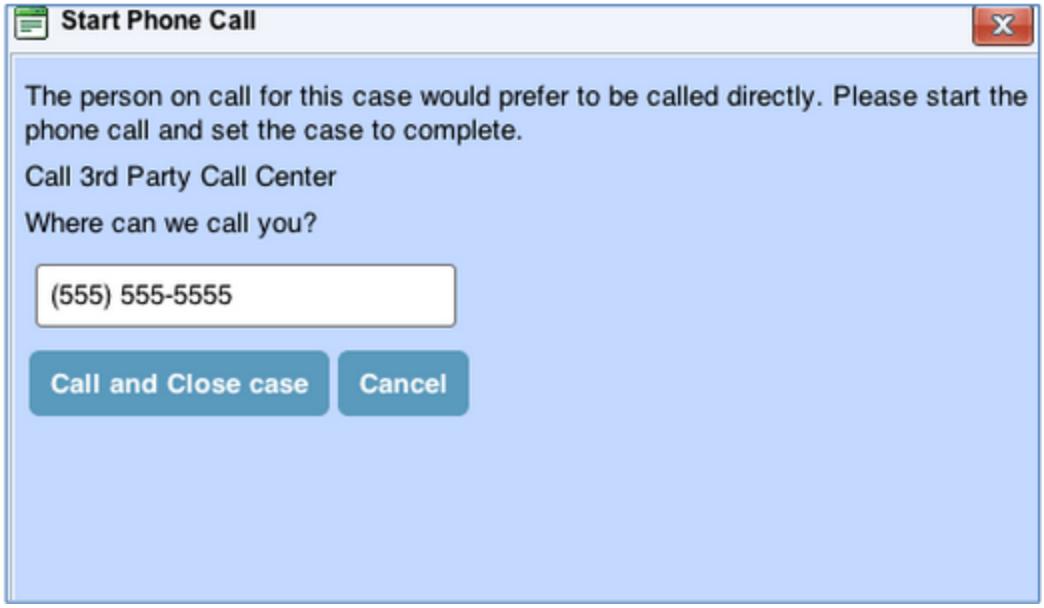




Call and Auto-close Cases

Schedulers can mark providers on a call calendar with the option to 'auto-call and close case'. This will prompt the referrer of a case to start a phone call with this user rather than wait for the provider to log in and reach out to them. This is particularly useful for use cases where a 3rd party call center can handle any escalations when a provider is unable to respond within a certain time.



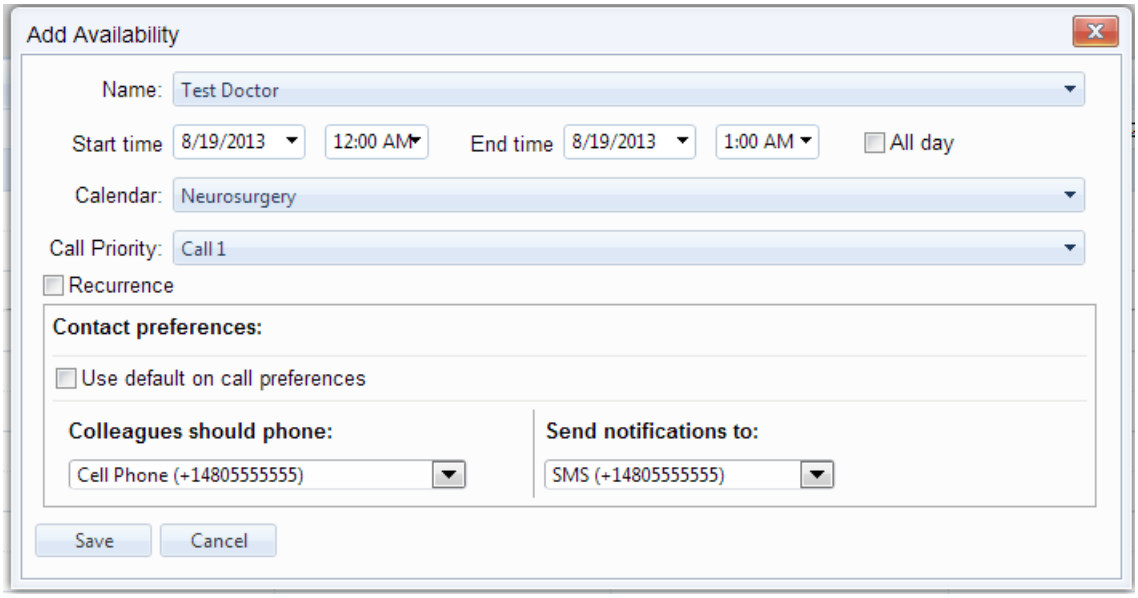

Start Phone Call
The person on call for this case would prefer to be called directly. Please start the phone call and set the case to complete.
Call 3rd Party Call Center
Where can we call you?
(555) 555-5555
Call and Close case
Cancel

The case overview page also shows who has been notified of the waiting case, and will count down the number of minutes until the case is escalated to the next provider on call.

Quick Case - ID 4743 details »
Case Requested 01/06/2014: Language Services - Somali
Collaborate
Video Call
Edit Visit
Add Medical History
Add Vitals
Add Provider Notes
Verify & Complete
Assign to Me
We have notified Matthew Albers (Doctor) (call priority 1) of this case. Your case will be escalated to 3rd party Call Center (call priority 2) in 00:00:01. Can't Wait? Call now.
0 Days 00:00:59 since case submitted
Details of Intake
Emerge Admin on 1/6/2014 2:04:53 PM
Requesting location Dr. Albers's iPad
Call Back Number (555) 555-5555

Contact Preferences

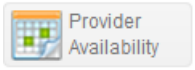
You have the ability to choose how you want to be contacted when on call. Contact preferences are set in your OnePass profile. However, you can alter your contact preferences when adding availability to the calendar. If you wish to change your default preferences, uncheck the **Use default on call preferences** box. This will provide you with a dropdown list for phone and notification contact preferences. Choose your preference for this on call period and click **Save**.


Add Availability
Name:
Test Doctor
Start time
8/19/2013
12:00 AM
End time
8/19/2013
1:00 AM
All day
Calendar:
Neurosurgery
Call Priority:
Call 1
Recurrence
Contact preferences:
Use default on call preferences
Colleagues should phone:
Cell Phone (+14805555555)
Send notifications to:
SMS (+14805555555)
Save
Cancel

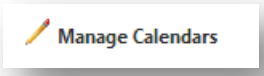
Site Administrator – Manage Calendars

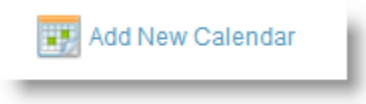
Service Lines or Specialties, such as Nephrology or Behavioral Health have corresponding On Call Calendars. When new service lines are created new calendars must be created to go with them. Please note that creation of a service line must be completed by Emerge.MD before you can take any of the following steps.

To create a new service line calendar, click the **Provider Availability** button from the Dashboard.

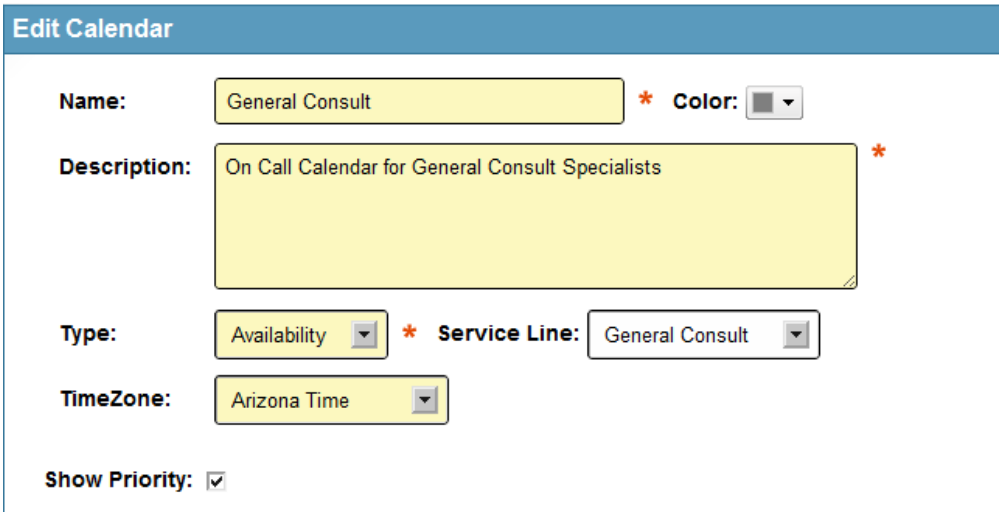


Click the **Manage Calendars** button and choose the **Add New Calendar** button.

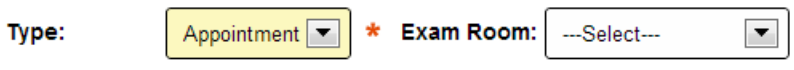




Name the calendar with the same name as the service line. Select a **Color** for the new service line. Give the calendar a description if you wish. Choose *Availability* as the **Type** and choose the **Service Line** from the list. Check the **Show Priority** check box.



If you are setting up an Appointment calendar the Service Line dropdown will change to an Exam Room dropdown.



Next you need to define user permissions for the calendar. Under **Access Controls** select the groups that will be associated with the calendar from the drop down list and click the **Add Group** button for each one. After each group is added check the appropriate permissions for each group.

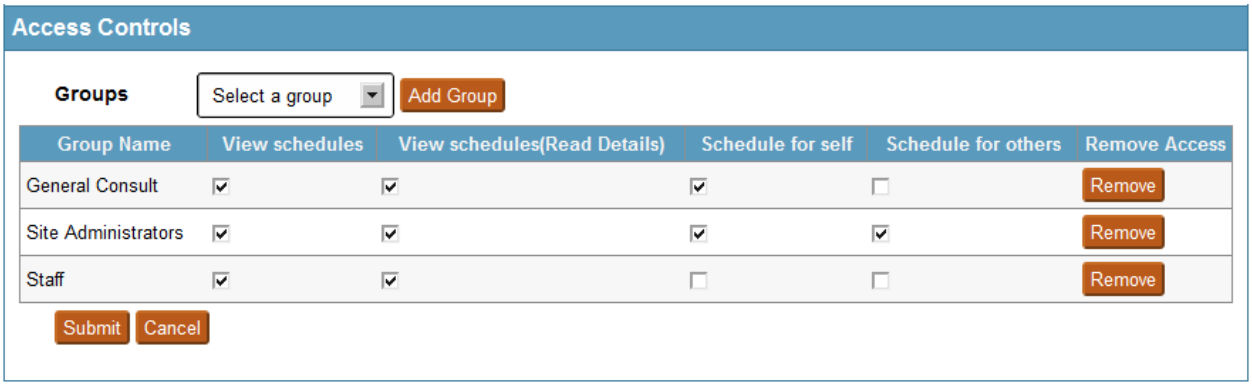
The following permissions should be selected for each group:

Specialists – [Service Line] – View Schedules, Read Details and Schedule for Self

Site Administrators – All privileges

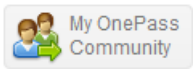
Staff – View Schedules and Read Details

Click the **Submit** button to complete.



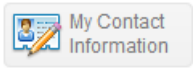
Site Administrator – One Pass Communities

Site administrators can access their OnePass communities from within the application. Click on the **My OnePass Community** button to be taken to your communities page in OnePass.



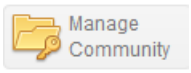
Site Administrator – Editing your Contact Information

Site administrators can edit their contact information from within the application. Click on the My Contact Information button to be taken to OnePass to edit your information.

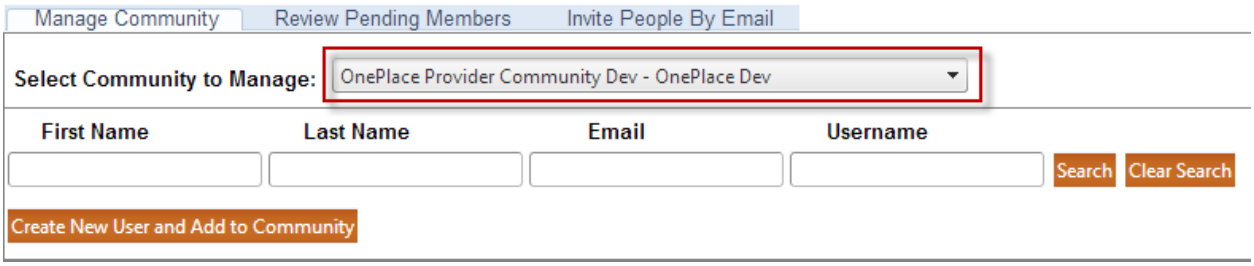


Site Administrator – User Provisioning

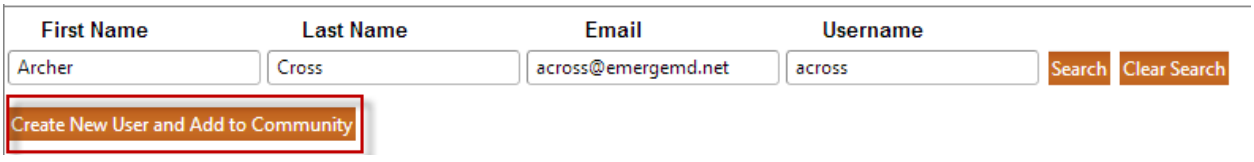
As the Site Administrator in Consult Accelerator, you can create new users and edit existing users. Click on the Manage Community button to be taken to the Manage Community page in OnePass.



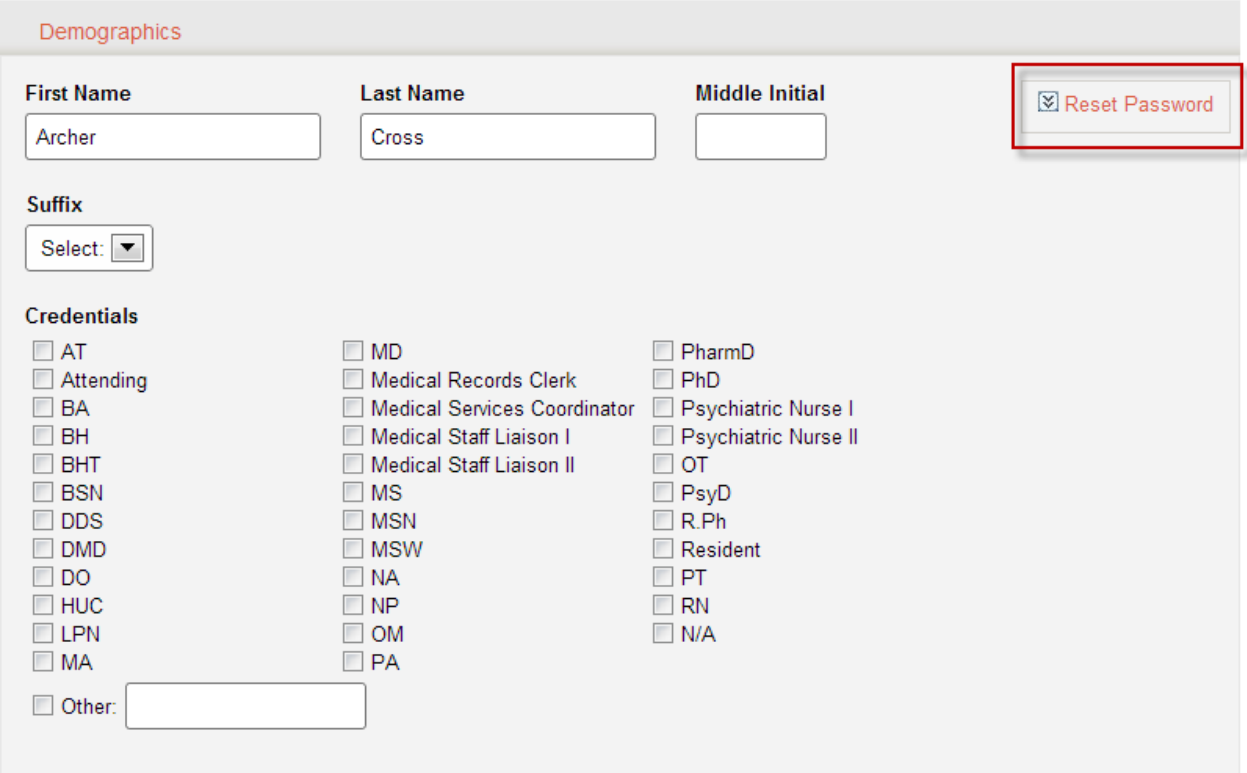
First select the community you want to work with from the **Select Community to Manage** dropdown.



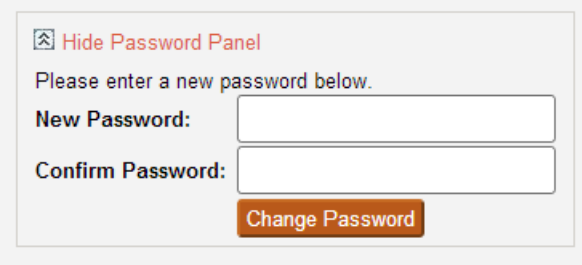
To create a new user and add them to a community enter their information and click on **Create New User and Add to Community** button.



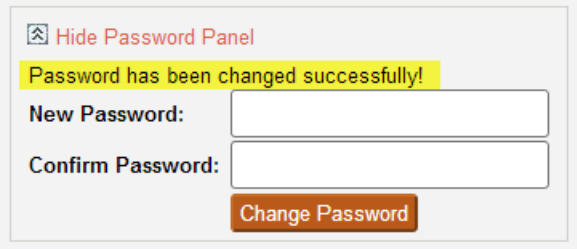
This will take you to the demographics page where you can finish filling in the user information. You can also create a password for the user or reset an existing user's password from here by clicking on the **Reset Password** button.



Enter in a password for the user and click **Change Password**.



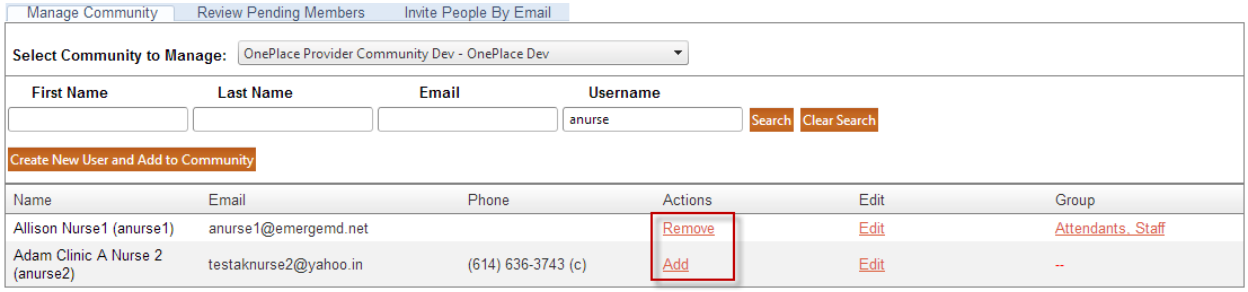
You will receive confirmation of the password reset.



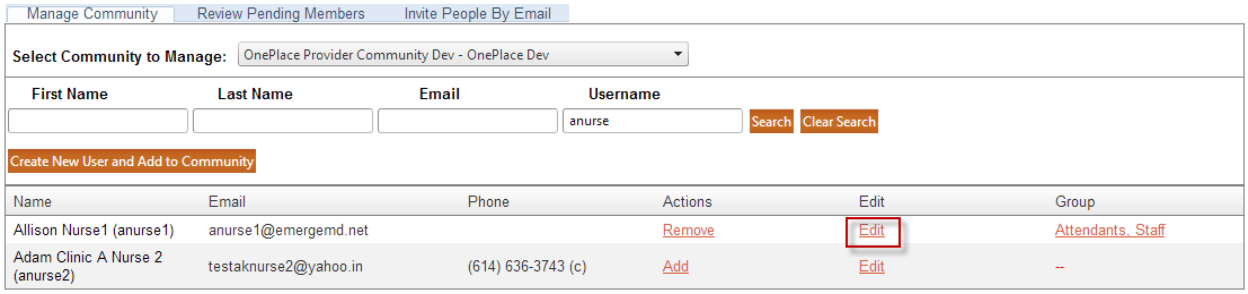
When you are done filling in the user's information click the **Complete** button at the bottom of the page to save the user and return to the Manage Community page.

You can search for a user to edit by entering their First Name, Last Name, Email, and/or Username into the search boxes and clicking **Search**. You can quickly clear the search boxes by clicking the **Clear Search** button.

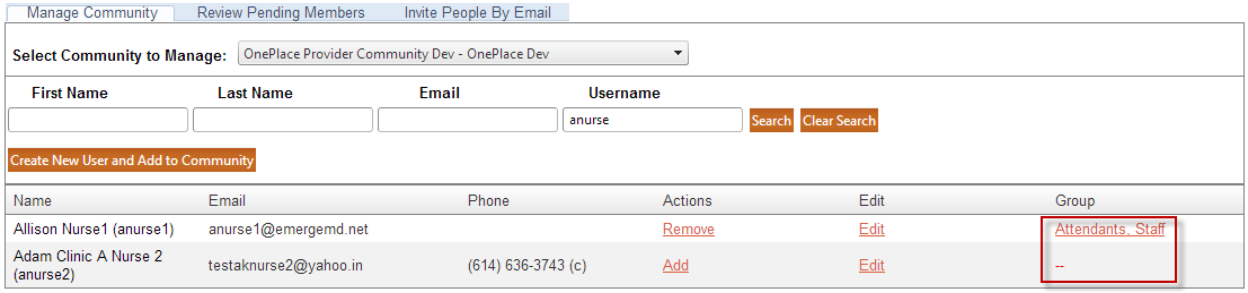
You can add or remove users from the selected community by clicking on the **Add** or **Remove** button under Actions.



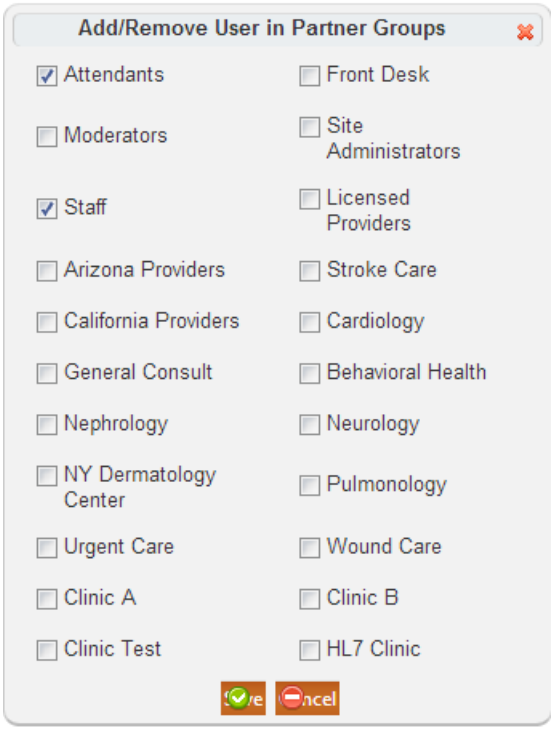
Clicking the Edit button next to a user's name will take you to the demographics form where you can update their information or password.



To edit a user's groups click on the list of groups or the **Add To Groups** link in the Group column.



This will bring up a list of groups. Check the box next to group to add the user to the group and uncheck the box to remove them. When you are finished click the **Save** button.



User Groups

Outlined below is a summary of some of the possible User Groups.

- ***Staff*** – By default, all users who are not patients are part of the Staff User Group. This user group allows view access of the calendars and will place these users in the list of those available for Telehealth visits and for the Send Message functionality.
- ***Referrers*** – This group gives access to create patient accounts, fill out medical history, submit referral cases, view provider documentation and add addendums. They can view all of the available queues.
- ***Specialists*** – This group gives access to view patient accounts, fill out medical history, view referral cases, create provider documentation, and add addendums. They can view all of the available queues.
- ***Front Desk*** – This group gives access to create patient accounts, fill out medical history, create referral cases, view provider documentation, and view addendums. They can view all of the queues. This group is primarily used for Patient Registration, Patient Scheduling and beginning a new Telehealth Visit to room a Patient.
- ***Site Administrators*** – This group has the most privileges of all the groups. Among some of their unique abilities they can; edit/create calendars, manage the editable content blocks, view reports, edit/create copay information, manage group access and manage ePrescribe. They can also create patient accounts, fill out medical history, create referral cases, create provider documentation, and create addendums.

- ***Service Line Groups*** – These are Specialty or Service Line groups to which the Specialists can belong. These groups allow the Providers to manage their On Call time in the corresponding Availability Calendars. (i.e. *Nephrology, Behavioral Health, Stroke Care*)

Referrers

User Groups: ***Staff*** and ***Referrers***.

Specialists

User Groups: ***Staff, Specialists,*** and ***Service Line Groups***

Front Desk

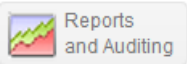
User Groups: ***Staff*** and ***Front Desk***

Site Administrators

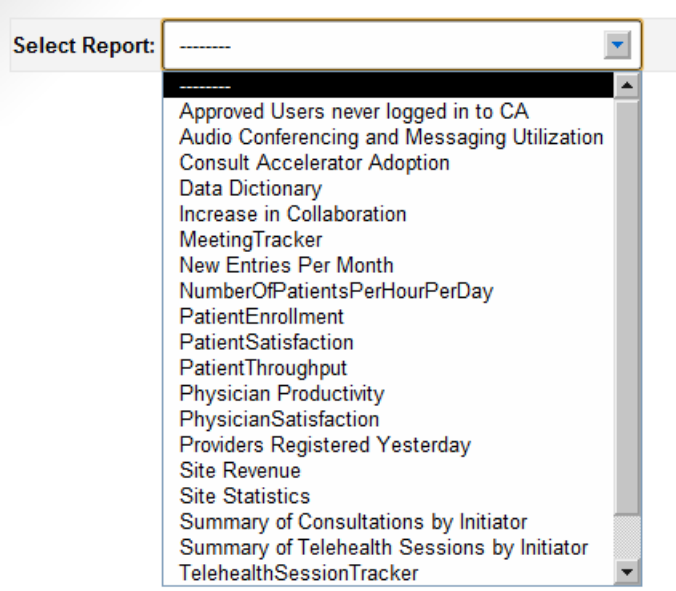
User Groups: ***Staff*** and ***Site Administrators***

Site Administrator – Reports

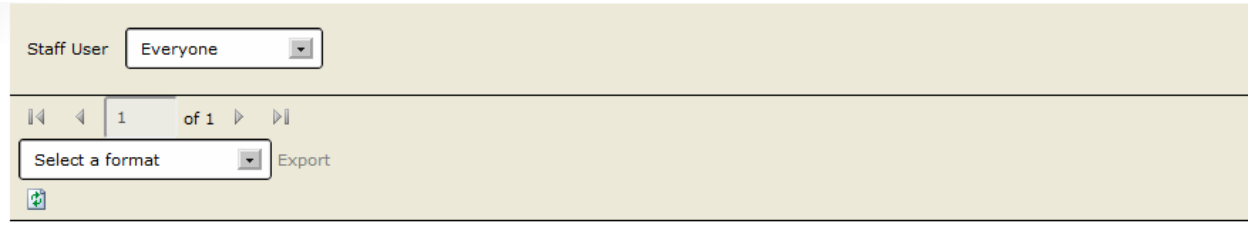
To view reports click on the **Reports** button at the top of the Dashboard page.



Choose the report you want to see from the **Select Report** drop down.



Below is an example of the Site Statistics report.



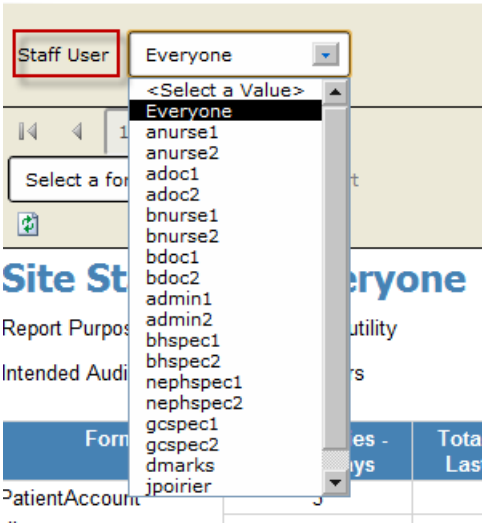
Site Statistics: Everyone

Report Purpose: To show application utility

Intended Audience: Staff administrators

Form	Total Entries - Last 7 Days	Total Entries - Last 30 Days	Total Entries	Total Edits - Last 7 Days	Total Edits - Last 30 Days	Total Edits
PatientAccount	3	30	30	4	33	33
History	2	9	9	3	12	12
Intake	5	49	49	6	85	85
PhysicianConsult	5	37	37	6	40	40
InsuranceInformationList	0	2	2	0	3	3
PhysicianAddendum	1	5	5	1	5	5
NIHStrokeScale	0	0	0	0	0	0
Total	16	132	132	20	178	178

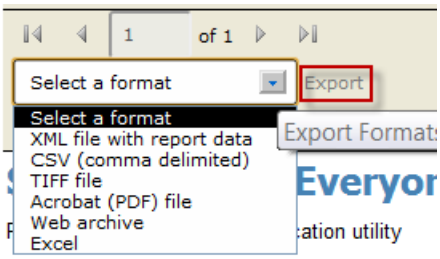
Some reports have parameters that can be edited to alter the view of the report. For example, Site Statistics has a **Staff User** parameter that can be set so the report shows everyone's statistics or a particular user's statistics.



When you select new parameters you must click the View Report button to refresh the report with the new settings.

Sometimes a report will require you to enter parameters before you can run it, but most reports run automatically using a default set of parameters.

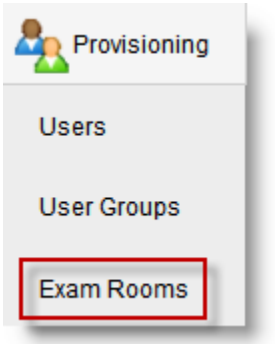
You can export a report in different formats by selecting the format from the **Select a format** drop down and clicking the **Export** button.



Configuring Endpoints (Emerge.MD staff only)

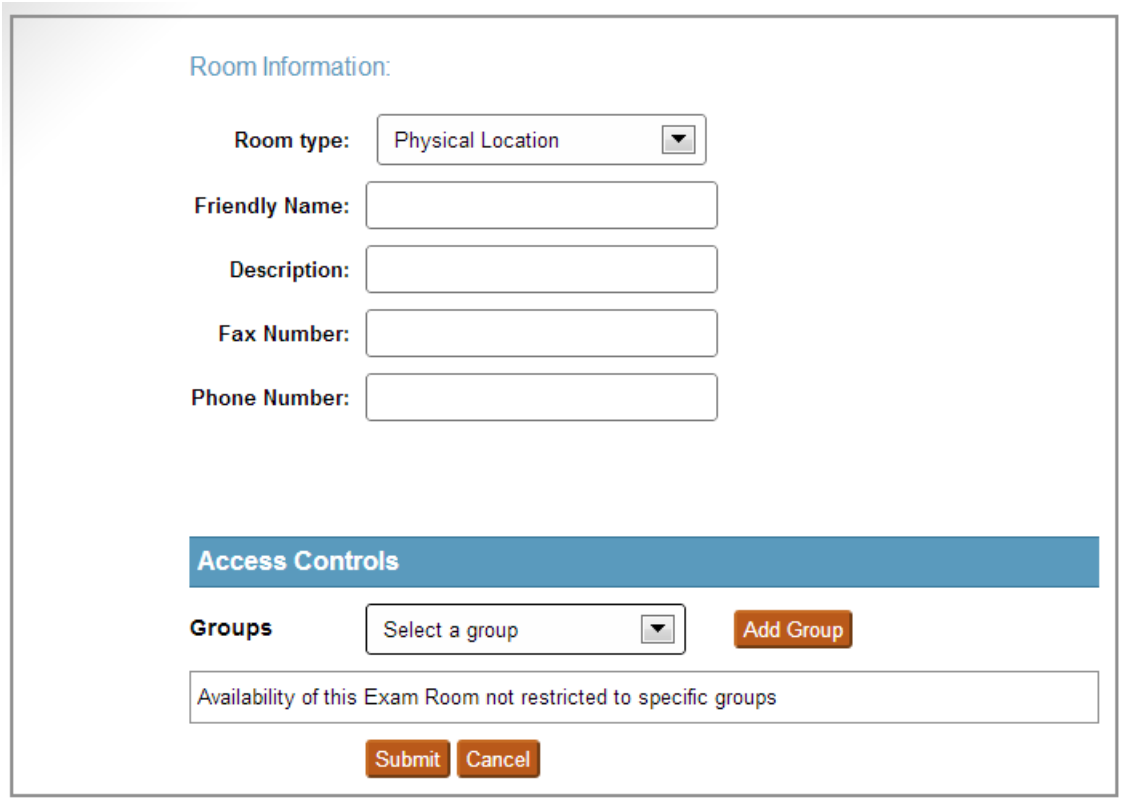
Exam Rooms

Hover over the Provisioning button and select **Exam Rooms**.



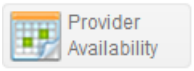
Click the **Add New Room** button.

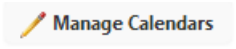
Choose the appropriate Room Type followed by a concise Friendly Name and Description. These will be used to link the Exam Room to the proper Calendar in the next step. Click **Submit** when complete. Allow *Staff* access to the room.



Calendar

To create the corresponding calendar, click the **Provider Availability** button from the Dashboard.



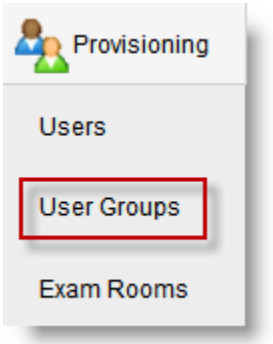
Click the  button and choose the **Add New Calendar** button.

Name the calendar the same as the Exam Room. Choose *Appointment* as the Type. The Exam Room will be the same as the Description from the Exam Room above. Allow *Staff* to have all privileges. Click **Submit** to complete.

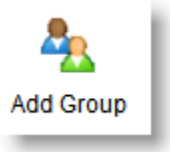
Configuring Service Lines (Emerge.MD staff only)

User Group

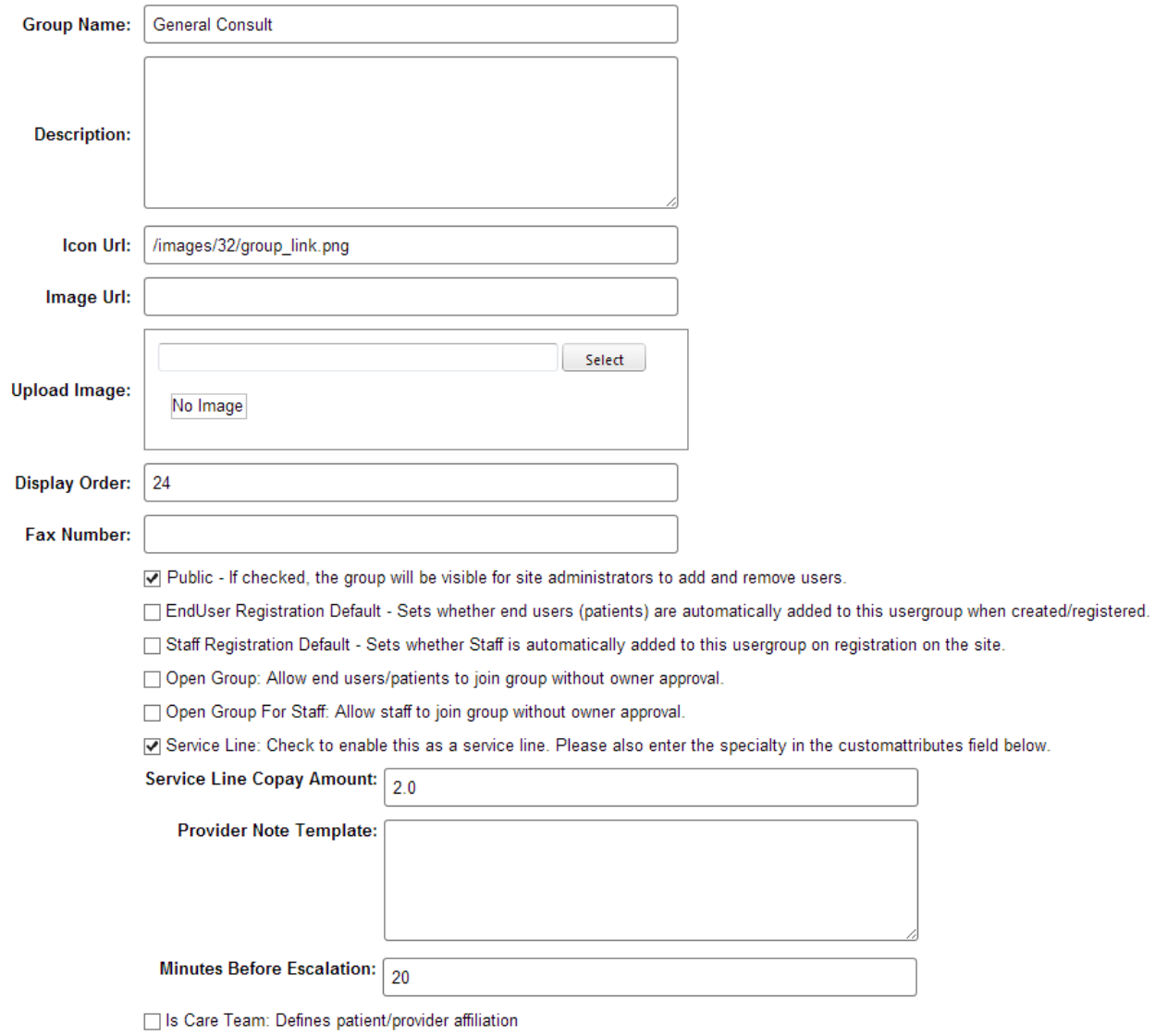
Hover over the Provisioning button and select **User Groups**.



Click the **Add Group** Button.



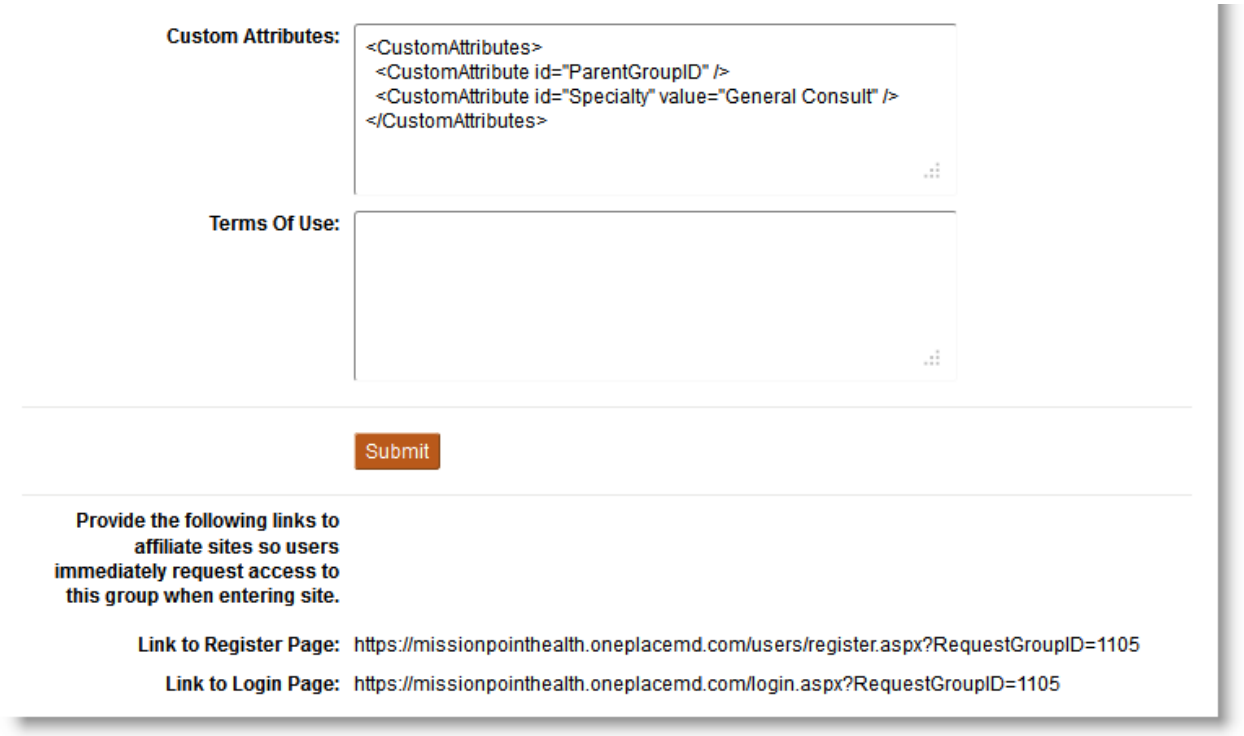
Enter the correct name for the Service Line. Check the *Public* and *Service Line* check boxes. You can optionally set a copay amount, provider template, and the number of minutes before call priority escalation that are specific to this service line.


Group Name:
General Consult
Description:
Icon Url:
/images/32/group_link.png
Image Url:
Upload Image:
Select
No Image
Display Order:
24
Fax Number:
Public - If checked, the group will be visible for site administrators to add and remove users.
EndUser Registration Default - Sets whether end users (patients) are automatically added to this usergroup when created/registered.
Staff Registration Default - Sets whether Staff is automatically added to this usergroup on registration on the site.
Open Group: Allow end users/patients to join group without owner approval.
Open Group For Staff: Allow staff to join group without owner approval.
Service Line: Check to enable this as a service line. Please also enter the specialty in the customattributes field below.
Service Line Copay Amount:
2.0
Provider Note Template:
Minutes Before Escalation:
20
Is Care Team: Defines patient/provider affiliation

Enter the **Custom Attributes** HTML like below. Enter your Group Name where *Group Name* appears below:

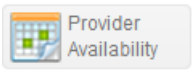
```
<CustomAttributes>

 <CustomAttribute id="ParentGroupID" />

 <CustomAttribute id="Specialty" value="Group Name" />

</CustomAttributes>
```

Click the **Submit** button to complete.



Calendar

To create the corresponding calendar, click the **Provider Availability** button from the Dashboard.



Click the button and choose the **Add New Calendar** button.

Name the calendar the same as the Service Line. Choose *Availability* as the Type and choose the Service Line as defined previously. Check the **Show Priority** check box.

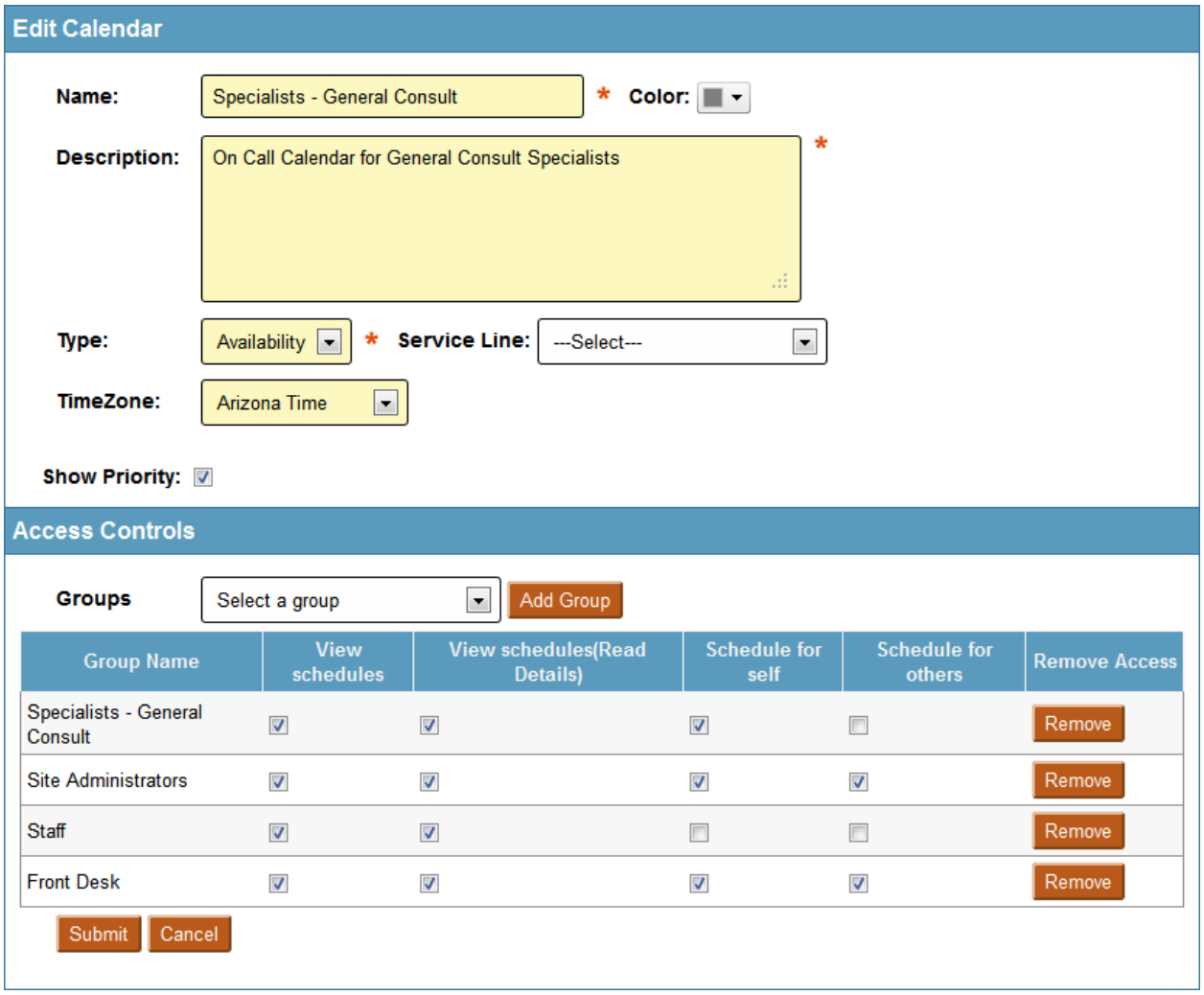
Define the ACL as follows:

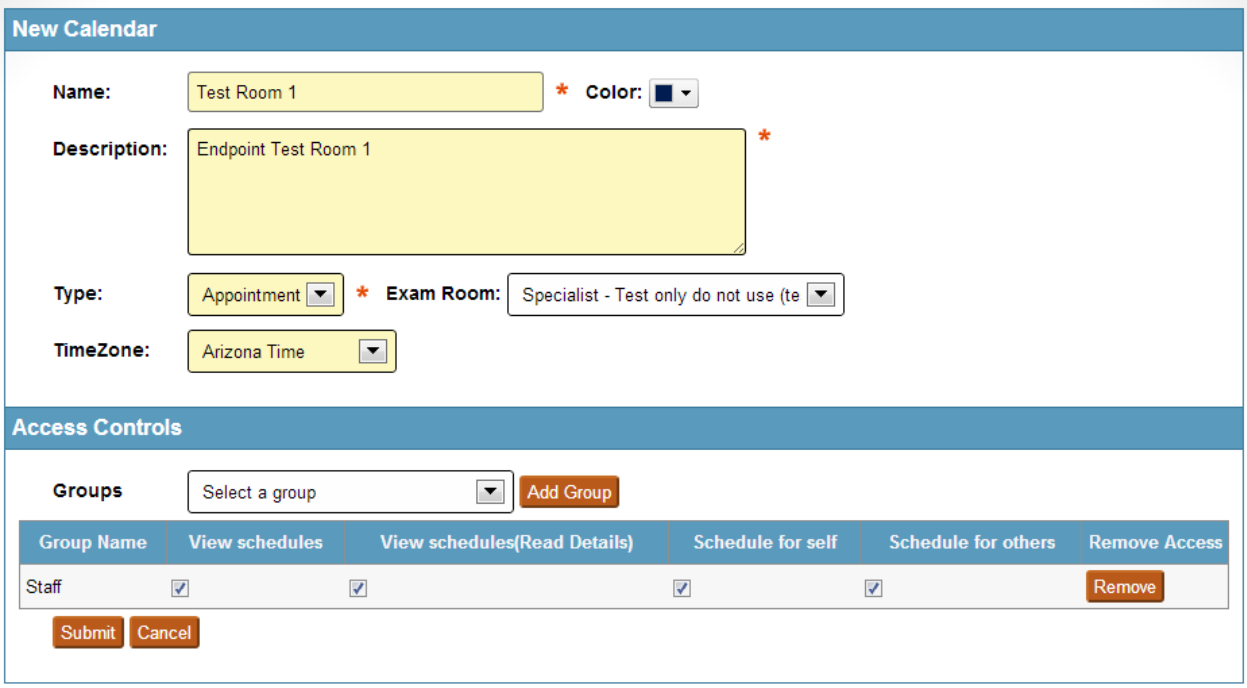
Staff – View Schedules and Read Details

Specialists – [Service Line] – View Schedules, Read Details and Schedule for Self

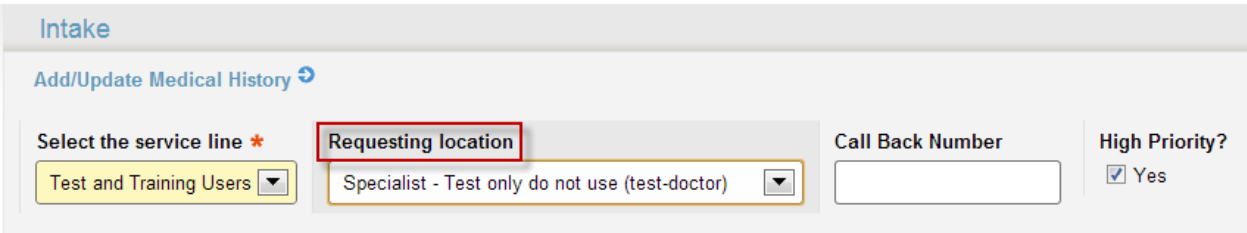
Front Desk and Site Administrators – All privileges

Click the **Submit** button to complete.


Edit Calendar
Name:
Specialists - General Consult
*
Color:
Description:
On Call Calendar for General Consult Specialists
*
Type:
Availability
*
Service Line:
---Select---
TimeZone:
Arizona Time
Show Priority:
Access Controls
Groups
Select a group
Add Group
Group Name
View schedules
View schedules(Read Details)
Schedule for self
Schedule for others
Remove Access
Specialists - General Consult
Remove
Site Administrators
Remove
Staff
Remove
Front Desk
Remove
Submit
Cancel



Now the Exam Room will show in the drop down list on page 1 of the Intake and it will be able to be scheduled for patient appointments.



Messaging

The messaging for the Consult Accelerator application consists of notifications that are sent via SMS, pager, or emails to specific employees. There are four notifications currently set up on this application, aside from the ones involved with telehealth sessions.

1. Referral Case Submitted – when a referring doctor submits a new case the on call specialists associated with the selected service line are notified of the submission.
    a. This message will be sent immediately upon completion of a case. This message is sent only once.
2. Physician Notes Completed – when a specialist completes their notes on a referral case the referring physician is notified.
    a. This message will be sent immediately upon completion of the physician notes form. This message is sent only once.
3. Moderator Alert Message – if you have users that belong to the moderators user group they will receive a message when a case is submitted.
    a. This message will be sent immediately upon completion of a case. This message is sent only once.
4. Case Assigned Message – when a case is assigned to someone that person will receive a message telling them a case has been assigned to them.

This message will be sent immediately upon assignment of a case. This message is sent only once.

Logging Out

To log out of the application, click on the **Sign Out** button located in the top right corner of every page underneath your username.